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EUS
Complete Tender Management

Buyer
User Guide

March 2013

version Control

Version	Date	Amendment
1.0	March 2012	Split Tender and Contract Management manuals NEW versions
1.1	April 2012	Include Release 6.9
1.0	July 2012	Include Release 6.9.1
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Table of Contents

SECTION 1: INTRODUCTION TO TENDER MANAGEMENT AND CONTRACT MANAGEMENT 5

SECTION 2: ACCESSING TENDER MANAGEMENT 6

2.1 Modules and settings within tender management 6

SECTION 3: MANAGEMENT OF INFORMATION 7

3.1 ”Projects”/Workspace 7
3.2 Create a ”Project”/Workspace 8
3.3 Assign team to ”Project” 8
3.4 ”Project” Document Folder 10
3.5 Bill of Quantities (BoQ) Manager /Price Schedule 10
3.5.1 Create rows directly within Tender Management 12
3.5.2 Import of data from external system 13
3.5.3 Import of data from received request 15
3.5.4 Formatting and Editing BoQ-file data 16
3.5.5 Navigation 17
3.5.6 Manage Break-ups 18
3.5.7 Attaching documents 19
3.5.8 Pricing the entire BoQ-file 19
3.5.9 Closing an Department or Tender 20

SECTION 4: INITIATE TENDER PROCESS 22

4.1 Initiate Tender process and create first Lot 22
4.1.1 Process alternatives 22
4.1.2 Create Tender with a single process and a Lot 28
Create Tender with several steps 33
4.1.3 Editing the Tender and setting up response 34
4.1.4 Multiple lots within a Tender 61

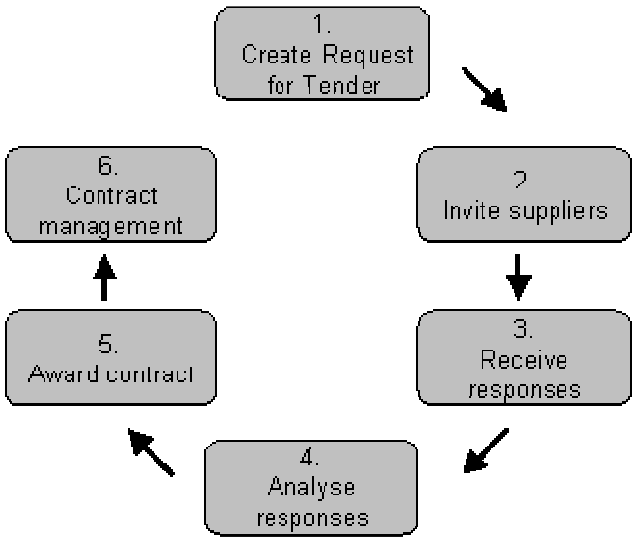
SECTION 5: MANAGE REQUEST FOR TENDER PHASE 63

5.1 Issue the Tender 63
5.1.1 Add suppliers 64
5.1.2 Pre-register a missing supplier 70
5.1.3 Invite supplier 71
5.1.4 Remove and Lock/Unlock 73
5.1.5 Publish the Tender notice 75
5.1.6 Opening proposals (optional) 78
5.1.7 Confidential documents (separate setting) 79
5.2 Analyse responses 80
5.2.1 Select supplier BoQ rates 85
5.2.2 Select supplier total quotes 85
5.3 Evaluation 86
5.4 Addenda 89
5.4.1 Buyer makes changes 90
5.4.2 Inform suppliers 93

5.4.3 Amending the notice 94
5.4.4 Buyer receives addenda from suppliers 96
5.5 Messaging 97
5.5.1 Send a message 98
5.5.2 Message archive 99
5.6 Short-list suppliers for next step within Tender 100
5.7 Award preferred supplier 101
5.7.1 Using the Alcatel directive 101
SECTION 6: SID4HEALTH MODULE 103
6.1.1 Setting 103
SECTION 7: MINI-QUOTE MODULE 105
SECTION 8: QUESTIONS AND ANSWER (Q&A) MODULE 107
8.1 User view 108
SECTION 9: GENERAL USER INFORMATION 109
9.1 Edit user profile 109
9.2 Digital signatures 111
9.2.1 Verification of digital certificate against external validation service 114
9.3 Approvals 116
9.3.1 Request an approval 116
9.3.2 Respond to received approval request 117
9.4 Document folders 118
9.4.1 Upload documents from PC 118
9.4.2 Version management 120
9.5 Reporting 121
9.6 My tasks 124
9.7 Other areas 126
9.7.1 Simplified graphical user interface 126
9.7.2 Planned System (CTM) down time 126
9.7.3 Check in / check out functionality 127
9.7.4 Opening and Tender Protocol (separate module) 127
9.7.5 Contract number (separate module) 129
9.7.6 IP check (separate module) 131
9.7.7 Printshops 131

Section 1: Introduction to Tender Management and Contract Management

EUS Tender Management (CTM) is a comprehensive tool that allows tenders to be created, distributed and evaluated without the need to create and manage paper documents. CTM makes the tendering process easier for both buyers and suppliers and covers the entire process including the contract management phase.



Tender Management is used by government organisations and general contractors to improve the efficiency of the tendering process. For those who respond to tenders, for example general contractors, sub-contractors and trades people, tender management simplifies and speeds up the process of formulating tender responses.

You can add all of the necessary drawings, specifications, schedules, tender documents and other attachments to the Request for Tender you issue or receive.

Buyers have access to a rich database of their chosen suppliers when issuing a Request for Tender. If appropriate, you can source potential new suppliers, complete with pre-qualification details, from the supplier database.

Suppliers are able to present information to initiating organisations at the time and place that purchasing decisions are made.

Tender Management offers you the following advantages:

- Saves you time and money compared with traditional methods
- Greatly improves the exchange and management of information
- Improves accuracy throughout the tendering, quotation and contract process
- Reduces time wasted on low value administration (faxes, phone, travelling)
- Increases traceability
- Web-based for easy access to information – anytime, anywhere

Section 2: Accessing Tender Management

EUS CTM (Contract Tender Management) is only available if your company has registered to use this system.

To access EUS CTM:

1. Open your web browser and go to your CTM logon page.
   Insert your Username and Password into the appropriate fields then click on the [Log in] button.

   The EUS Tender Management Welcome Page displays.

2.1 Modules and settings within tender management

Tender management has modules and settings which can be switched on or off. This guide describes all modules and settings available within the tendering process. If you do not find specific links or modules when accessing the system it is likely that certain modules are switched off. To see the modules you can access, review your personal profile described in section Edit user profile within this document.

Modules that can be switched off are for example E-Auctions, Approvals, Dynamic Purchase System, Meta Data and Dynamic Forms.

To read in detail about the contract module and process within CTM please read the Contract Management manual.

If you would like certain modules switched on, contact your company administrator or your CTM support.

Section 3: Management of Information

The Tender Management solution can be run ”Project” based if desired. ”Project´s” enable re-use of information between Request for Tenders, collection of all ”Project” related documents in a ”Project” document folder and gives access to the Bill of Quantities (BoQ) Manager. Depending on authority setting and semantics the word ”Project” might in your configured solution be called e.g. workspace, folder or department depending on your authority structure. In this user manual the word ”Project” is used as the possibility to group your tenders into either for example: tender types, category procurement types etc.

To access your ”Project´s”, click on the My Request for Tenders link. You may see a link in both the Buyer and Supplier services area. This is because you may have registered as a buyer and a supplier.

3.1 ”Projects”/Workspace

Within ”Projects”/Workspace you can create any number of Tenders, the ”Project” functions as a grouping with similar Tenders within the same area OR for example by department etc. Within the ”Project” you assign your team or group of members that will be working in the ”Project” and there is also a document folder where you can upload ”Project” specific documents such as ”Project” plan. Each of the uploaded documents can be linked in to any of the Tenders within the ”Project”.

3.2 Create a ”Project”/Workspace

To create a new ”Project”:

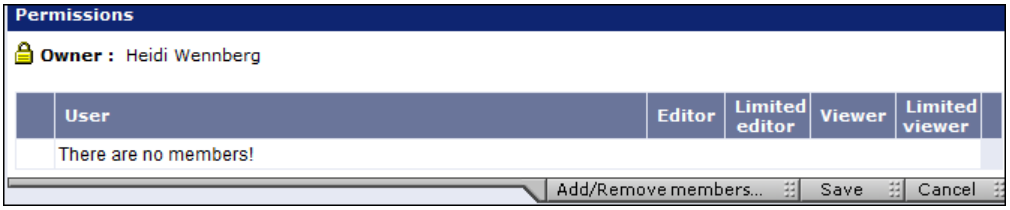
1. From the home page, click on the My Request for Tenders link. The My Request for Tenders screen displays.

2. Click the [Create new Project] button.

3. Fill out the form. Ensure that mandatory fields (*) are completed.

4. Click on the [Save] button.

5. The Edit access for ”Project” screen displays. Click Add/Remove members. If no new members can be added at this point, click cancel. New members can be added later, see Section 9.4 Assign team to ”Project” for more information about adding members.



6. General information about a ”Project” can later be edited. Just press the [Edit Project] button for the required ”Project” and edit the information.

When creating Tenders the ”Project’s” general information will be used.

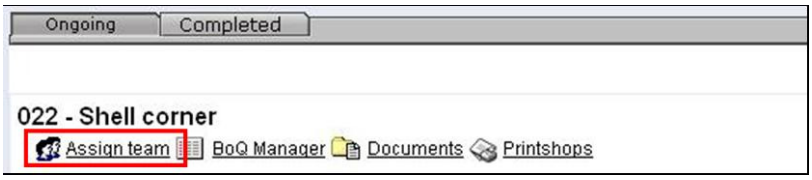
3.3 Assign team to ”Project”

By assigning team and users to a ”Project” you will give access to users within your company to work within the ”Project” and all Tenders created within. You can assign editor or viewer access rights. Afterwards on actual tender level you will have the possibility to select which of the project members should also receive any messages sent within the system for that specific tender.

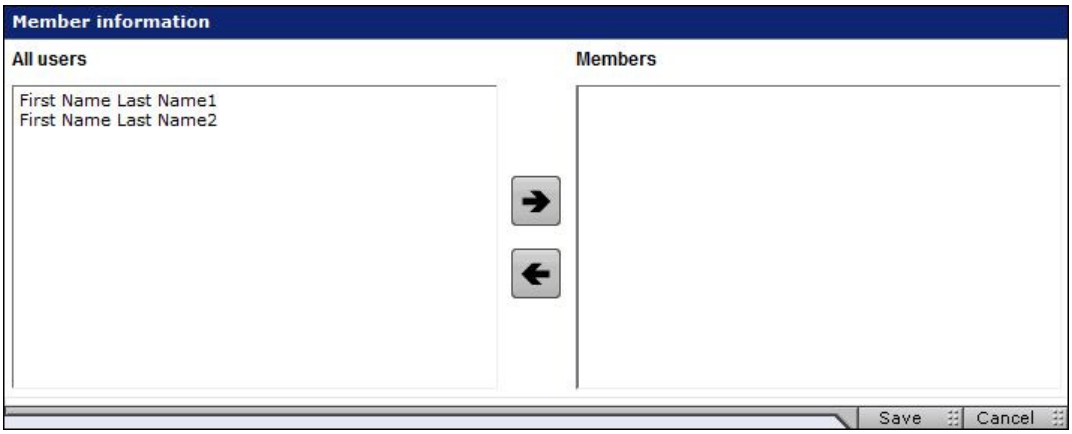
To assign teams and users to a ”Project”:

1. From the home page, click on the My Request for Tenders link. The My Request for Tenders screen displays.

2. Click the Assign team link for the ”Project”.



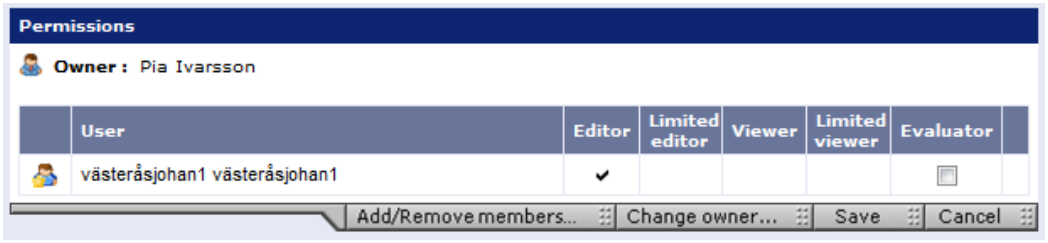
3. The Edit access for ”Project” screen displays. Click the [Add / Remove members] button, a list of available users and teams will show.



4. Select the teams and users you want to give access to your ”Project”, use the arrows to move them to the right hand pane. Use the Ctrl-key to select more than one user.

5. Click [Save] when done

6. Select the roles a team or user will have in your ”Project” by clicking the boxes for each user and team. The following roles are available.



- **Editor** – Can both access and change information within the ”Project”, i.e. adding documents, creating Tenders, change any of the Tenders within the ”Project”.

- **Limited editor** – Can edit Tenders or created contracts within ”Project”, but cannot create any new ones

- **Viewer** – The viewer can see all the ”Project” information, but cannot edit anything within the ”Project”.

- **Limited viewer** – The limited viewer has the same access as the viewer, but cannot see the supplier quotations sent in.

7. Click [Save] when the selecting of roles is completed.

8. **Change owner** - You also have the possibility at later stage to change owner of this project (same functionality exists on tender level)

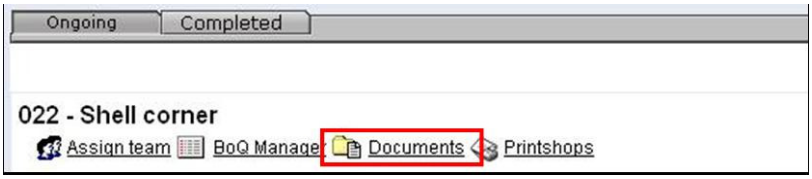
3.4 ”Project” Document Folder

The”Project” document folder is a way for you as user to store all”Project” related documents in one place. The documents can be used within each of the Tenders in the ”Project” by linking them in.

To access ”Project” document folder

1. From the home page, click on the My Request for Tenders link. The My Request for Tenders screen displays.

2. Click on the Documents link for the required ”Project”. The Document folder screen displays. For more information about the functionality within a document folder, see Section 9.4 Document Folders.



3.5 Bill of Quantities (BoQ) Manager /Price Schedule

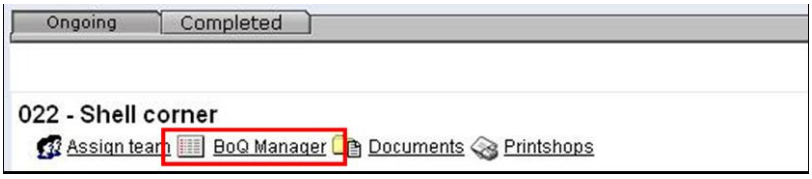
Please note that at any place within CTM where it says BoQ (Bill of Quantities) this is the same as Price Schedule or Price List depending on authority.

The BoQ Manager offers tools to work efficiently with entire bill files. Using the BoQ Manager you can exchange data with estimating Lots, break-up a BoQ-file into separate files for later distribution within Tender Lots and follow-up on prices at BoQ-file level.

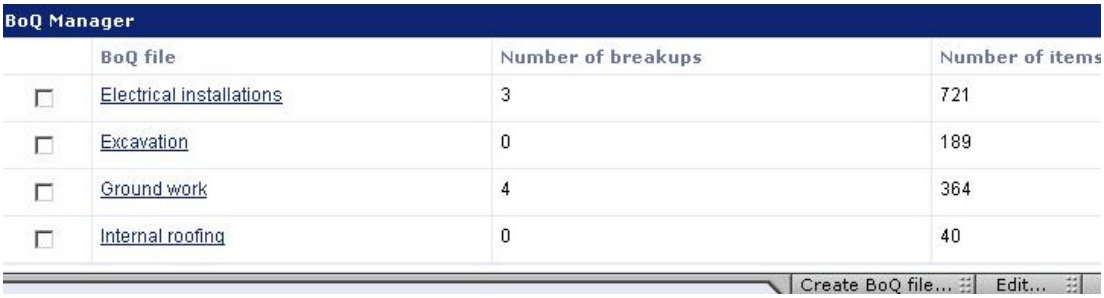
To access the BoQ Manager:

1. From the home page, click on the My Request for Tenders link. The My Request for Tenders screen displays.

2. From the My Request for Tenders screen click the BoQ Manager link.



3. The list all BoQ-files, if applicable, within the ”Project” are displayed.



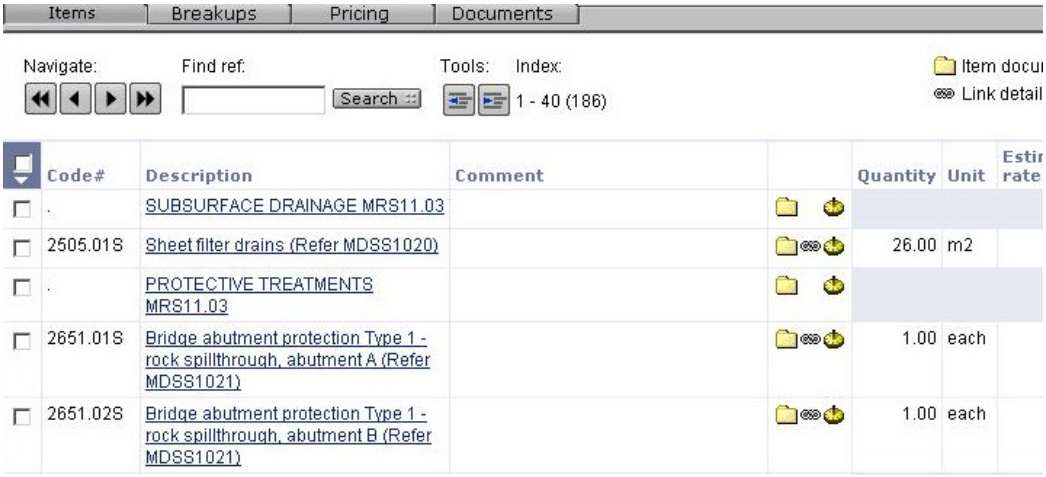
To create a new BoQ-file:

1. From the home page, click on the My Request for Tenders link. The My Request for Tenders screen displays.
2. From the My Request for Tenders screen click the BoQ Manager link.
3. Click the [Create BoQ file] button. The Create BoQ file screen displays.
4. Enter the name of the BoQ file and click on the [Save] button.
5. Click on the BoQ file name to open the new BoQ-file.

BoQ Tabs:

A created BoQ-file has the following tabs:

- **Items** – Contains the entire BoQ-file in a long list. From this tab you import data from estimation Lots, edit/delete items etc.
- **Break-ups** – Contains the break-ups created. From this tab you can create break-ups, view items per break-up and split a BoQ-file into break-ups using the assembler.
- **Pricing** – A pricing view of the entire BoQ-file by break-up. On this tab you can see the prices selected for each break-up and a link to the relevant Tender.
- **Documents** – Contains all the documents attached on all the items within the BoQ file. The items are displayed as folders and in a tree view. You can easily attach documents to each item from this view



A BoQ-file can be populated with data in three different ways:

- **Create rows directly within Tender Management –** Single items can be created manually within the tendering solution

- **Import data from external system –** The tender solution supports “one-off” imports as well as multiple imports if the external system is used as a master. The import can also be made from a generic Excel sheet. A template for the Excel is available on the import page.

- **Import of data from a received request –** If having received a request you can use the data received to create your own BoQ-file used to collect prices from different suppliers.

3.5.1 Create rows directly within Tender Management

You can create rows directly within a BoQ-file in Tender Management. This can be used to populate an empty BoQ-file or to add rows to imported data.

To create a row:

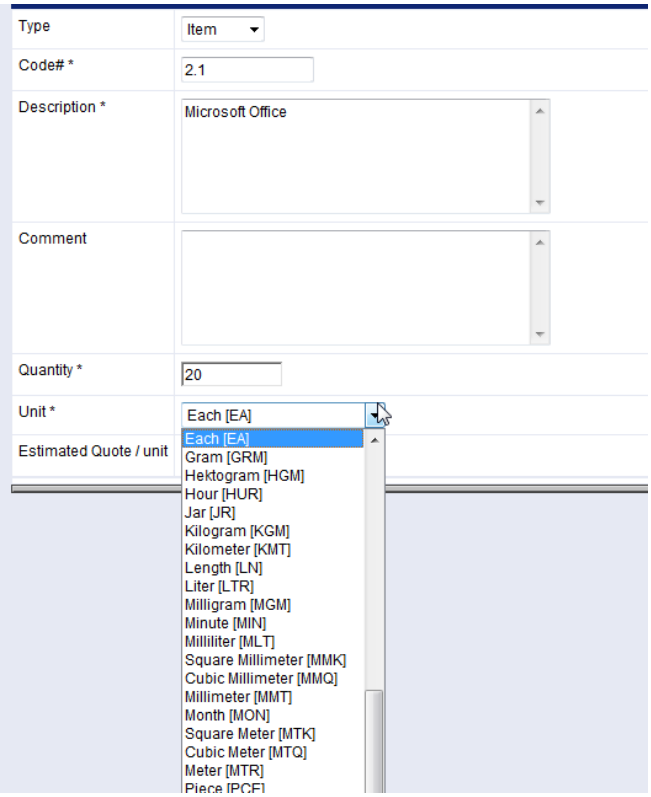
1. From the home page, click on the My Request for Tenders link. The My Request for Tenders screen displays.

2. From the My Request for Tenders screen click the BoQ Manager link.

3. Click on the name of the required BoQ-file. The { Items } tab screen is active.

4. Mark the row by ticking the checkbox to the left of the item you want to insert a new row after. If no row is selected the row will be placed last.

5. Click the [Add row] button. The Create/Edit row screen displays.

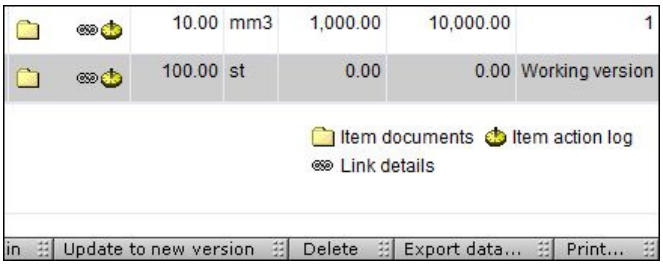


6. Select what type of row you want to create (Item / Header / Note) from the Type dropdown and complete the required information.

7. Estimated rate is optional information. It can be used as benchmark for prices received.

8. Click the [Save] button.

9. When an item has been created it displays as draft (Working version). Any item which is being a draft is not available to be used in any Tender. To make the items available, select the items and click the [Update to new version] button. If you publish a tender that contain working version BoQ the system will warn you that you have items in working versions.



3.5.2 Import of data from external system

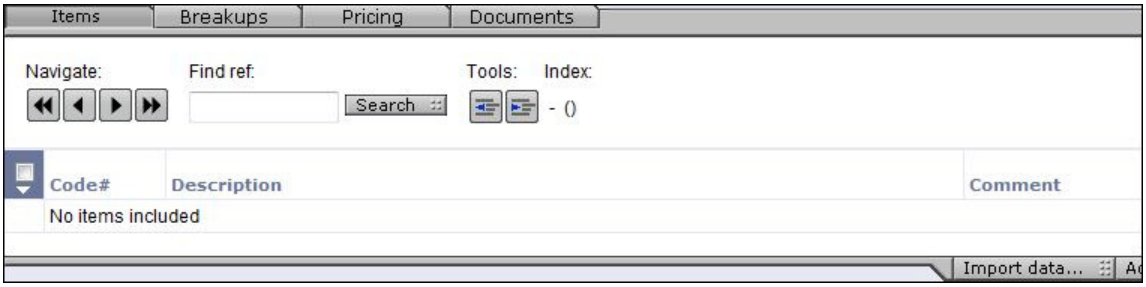
The tender tool supports import of BoQ-file data from external systems. After import the data can be edited in the same way as any data created on the tender solution.

To import data from external system:

1. From the home page, click on the My Request for Tenders link. The My Request for Tenders screen displays.

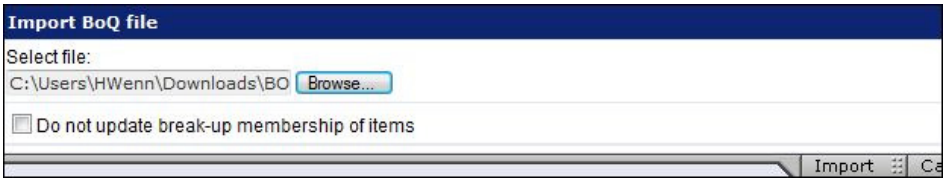
2. From the My Request for Tenders screen click the BoQ Manager link.

3. Click on the name of the BoQ-file. The { Items } tab screen is active.



4. Click the [Import data] button.

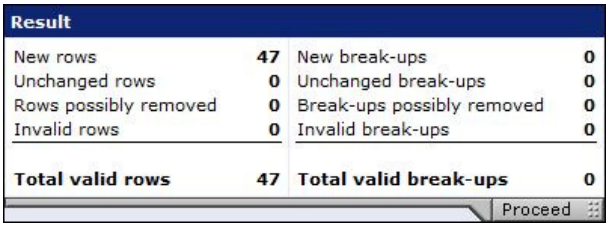
5. Use the Browse function to select the file to be imported from your computer.



6. Click the [Import] button.

7. The import BoQ-file is displayed. Make any changes and click Import.

8. The import report page is displayed with information about the import that is about to take place. The page displays the number of items that will be created on the system. If errors are found in the import file they are displayed and you are asked to proceed or cancel. If there are more than three errors found in the import file there is likely something wrong with the import file and no import can be done.



9. Click on [Proceed] to execute the import and OK to confirm.

10. The { Items } tab screen is active.

11. Click on the { Breakups } tab to view any break-ups imported.

Multiple imports (if supported by external system):

If you continue making changes after the BoQ-file has been imported you can import the same BoQ-file again. Upon the second import the Import report will display the following information:

- **Number of new items –** The number of items that will be created.
- **The updated items –** A list of all items changed. You can decide to update all or only a sub-set of the items.
- **Not updated items –** A list of all items that will NOT be updated. They may have been CREATED on the tender solution AFTER the previous IMPORT or have been DELETED in the EXTERNAL system. If deleted, you need to go down the list and delete them in the tender solution as well.

When [Proceed] is clicked the update is executed. You may run any number of consecutive imports.

3.5.3 Import of data from received request

(Only for users with access to Multi level tendering)

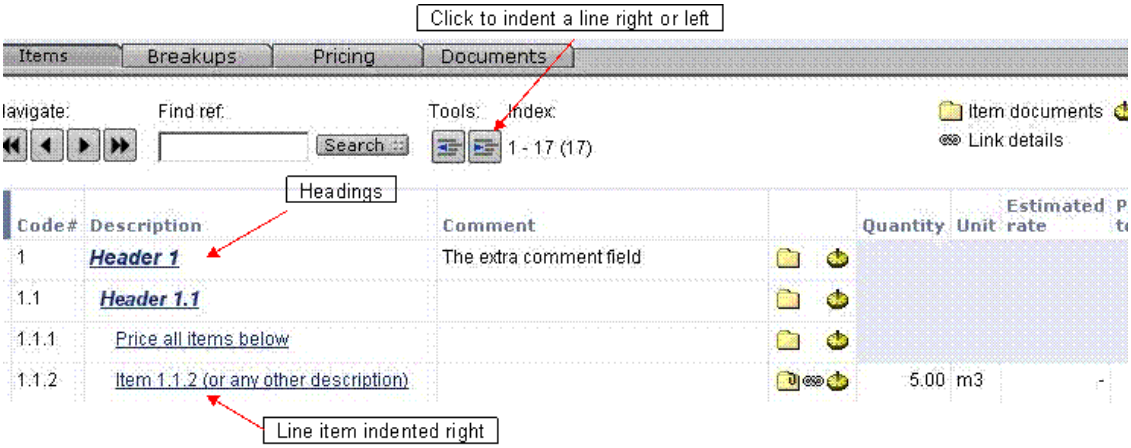
If you have received a request you can use the data received to create your own BoQ-file to collect prices from different suppliers. This feature is only available if having the supplier membership and the buyer membership.

To import data from received request:

1. From the home page, click on the My Request for Tenders link. The My Request for Tenders screen displays.
2. From the My Request for Tenders screen click the BoQ Manager link.
3. Click on the name of the BoQ-file. The { Items } tab screen is active.
4. Click the [Copy from Tender] button.
5. Select the tender that you want to import data from.
6. Click [Copy all rows] or [Copy selected rows] to add the items to your BoQ file. If the buyer owner of the incoming Tender has selected you to copy the break-up information you will see a drop-down to select the break-up to copy.

3.5.4 Formatting and Editing BoQ-file data

For ease of reading and navigation within the BoQ-file, header levels are formatted with a difference in size of text, use of bold, italic etc. Rows are also adjusted right depending on their position within the BoQ-file



Use the buttons to indent rows.
BoQ-file rows can be edited or deleted within the BoQ Manager.

To edit a row:

1. From the home page, click on the My Request for Tenders link. The My Request for Tenders screen displays.

2. From the My Request for Tenders screen click the BoQ Manager link.

3. Click on the name of the required BoQ-file. The { Items } tab screen is active.

4. Mark the row you want to edit by clicking on the description of the item. The Edit Item screen displays.

5. Make the required changes then click the [Save] button.

6. When an item has been edited the version is changed from “real” version to draft of working version. Any item being a draft version is not available to be used in any Tender. To make an item available for use in the Tenders, select the item(s) and click the [Update to new version] button.

To delete a row:

1. From the home page, click on the My Request for Tenders link. The My Request for Tenders screen displays.

2. From the My Request for Tenders screen click the BoQ Manager link.

3. Mark the row you want to delete by clicking in the checkbox to the left of the item.

4. Click the [Delete] button.

5. A confirmation message displays. Click OK to proceed and delete the item.

If a row has been included in a tender (directly or through a Lot as described below) all changes made in the BoQ Manager also are reflected within the corresponding Tender.

3.5.5 Navigation

To avoid long download times a BoQ-file is always presented as 40 rows at a time. The following toolbar is always available for navigation within a BoQ-file:

Takes you to the next 40 rows of the BoQ-file.

Takes you to the previous 40 rows of the BoQ-file

Takes you to the last 40 rows of the BoQ-file

Takes you to the first 40 rows of the BoQ-file

You can also go directly to a specific row by using the search functionality. The search is independent of what reference system is being used.

To search for an item in the BoQ:

1. From the home page, click on the My Request for Tenders link. The My Request for Tenders screen displays.

2. From the My Request for Tenders screen click the BoQ Manager link.

3. Enter the item reference number in the Find ref field.

4. Click on the [Search] button.

5. You are positioned at the first occurrence of the reference within the BoQ-file.

3.5.6 Manage Break-ups

The break-up functionality provides a way to top-down split a BoQ-file into break-ups that are suitable for the procurement. One or more break-ups can then be included in a Tender.

All rows included in one break-up are by default presented in the same order in relation to each other as they were within the BoQ-file.

By default the rows also have the same formatting within a break-up as they had within the BoQ-file. You can create specific formatting that differs from the BoQ-file using the buttons. When the break-up is assigned to a Tender the group specific formatting will be used.

To split a BoQ-file into break-ups:

1. From the home page, click on the My Request for Tenders link. The My Request for Tenders screen displays.

2. From the My Request for Tenders screen click the BoQ Manager link.

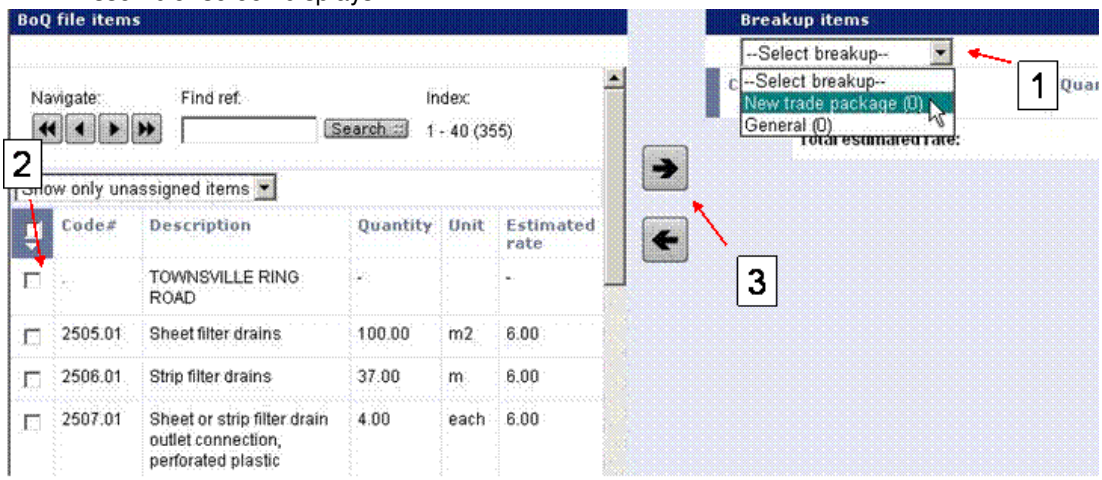
3. Click on the required BoQ file. The Bill of Quantities screen displays.

4. Click on the [Break-ups] tab.

5. Click on the [Add break-up] button to create a break-up. The break-up details screen displays.

6. Type the name of the break-up then click the [Save] button.

7. Click the [Assembler] button to access the Lot assembler. The BoQ Lot Assembler screen displays.



8. Select a break-up on the right hand side to assign rows to. (1)

9. Select the rows to be assigned on the left hand side by clicking the checkbox to the left of the item. (2)

10. Click the button. The item is removed from the left hand list and moved to the right hand list. (3)

11. When the required items are added to the right hand side Lot click the [Close Window] button.

12. To unassign a row from a break-up, select the item/s within the group and click the button. The row can now be included in another group.

3.5.7 Attaching documents

Each item within the BoQ file can have documents assigned to them. The documents tab is a quick way of getting a complete overview of the documents attached to the items within the BoQ file.

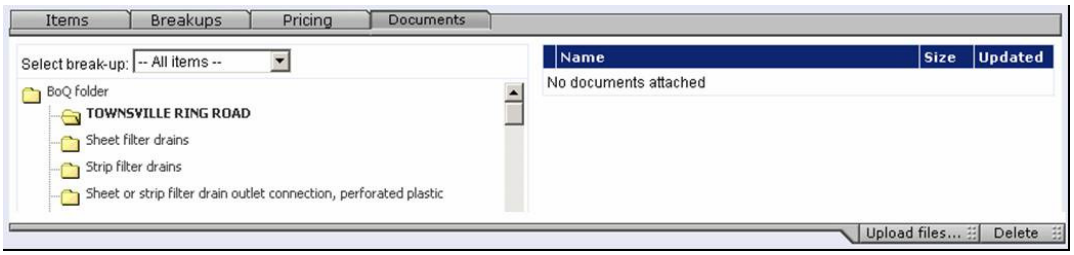
To upload documents from the documents tab:

1. From the home page, click on the My Request for Tenders link. The My Request for Tenders screen displays.

2. From the My Request for Tenders screen click the BoQ Manager link.

3. Click on the required BoQ. The Bill of Quantities screen displays.

4. Click on the { Documents } tab, the items are displayed as a folder list.



5. Use the [Upload files…] to upload files to each of the items. Any documents uploaded are also available from the Main items list and the Folder icon for each item.

3.5.8 Pricing the entire BoQ-file

Within the different Tenders issued you can follow-up on prices received within that specific break-up. The pricing tabs within the BoQ Manager gives you a complete

view of prices for the entire BoQ-file based on selected suppliers within the Tender. The pricing information is displayed per break-up or for the whole BoQ file.

To view pricing of an entire BoQ-file:

1. From the home page, click on the My Request for Tenders link. The My Request for Tenders screen displays.

2. From the My Request for Tenders screen click the BoQ Manager link.

3. Click on the required BoQ-file. The BoQ-file screen displays.

4. Click on the { Pricing } tab.

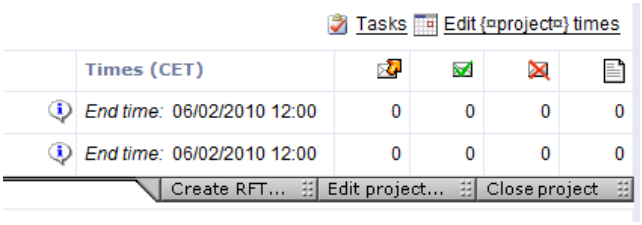
5. Click on the desired BoQ break-up.

If you continue negotiations with a supplier that has been selected above, any changes in prices from that supplier will also be reflected on the pricing tab.

From the item price tab a priced BoQ-file can be exported for further use of the price data in any external system.

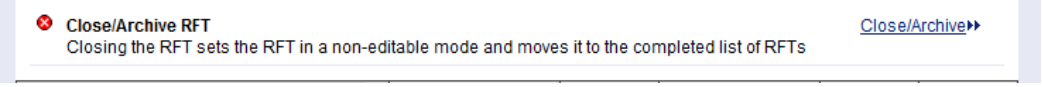
3.5.9 Closing an Department or Tender

Close Tender
After having finished the process you can close the Tender or a whole ”Project”. All closed Tenders and ”Project´s” are moved to the Completed tab, both for you as a buyer and on the supplier side.



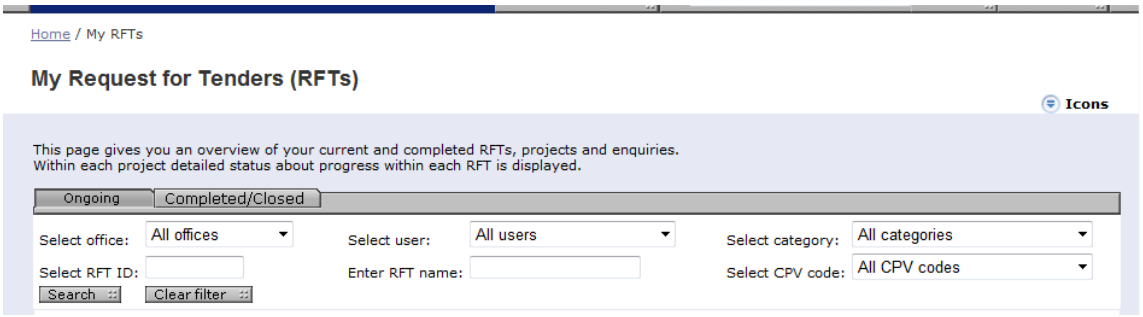
After closing no changes can be made to either the ”Project” or the Tender.

To close/archive the RFT you should go to one of the last points in the checklist:

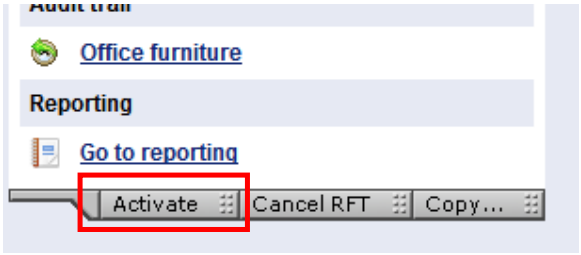


Once you have archived your tender it is then not editable with exception of user rights and internal documents.

You can find your archived tender in the completed tab of your tender list



A closed tender can be reopened again, should the need araise. To reopen the tender go to the administration view next to checklist and click on the activate button.
Any user with “editor” rights to the tender kan reopen it and the reopening will be logged in the audit trail



Close Project

When all work and all tenders within a certain ”Project” is finished, the ”Project” can be closed. When closing a ”Project”, all of the Tenders within that ”Project” that are not already closed will be so. Closing also means that the ”Project” and all containing data such as Tenders **cannot** be **edited**.

Closing a ”Project” will not delete it from the CTM system. It will just be moved from the { Ongoing } tab and can later be found on the { Completed } tab.

To close a ”Project”:

1. From the home page, click on the My Request for Tenders link. The My Request for Tenders screen displays.

2. Click the [Close ”Project”] button for the ”Project” that you want to close.

3. If you have open Tenders within the ”Project” that you are trying to close a message will display saying that the open Tenders will be closed when closing the ”Project”. If this is ok, press the Ok button. Else press Cancel to keep the ”Project” open and continue to work with the Tenders.

Section 4: Initiate Tender process

CTM supports Tender Management, eAuctions and contract management. The administrator decides and can design the “process templates” to be available for the users within the system. A process template may contain any number of “phases” and multiple phases of the same type. That means that you can run a process with multiple Tender phases, e.g. one for pre-qualification/PQQ and one for tendering/quotation and if needed one for negotiation. The following types of phases are available within the system:

Types of phases:

Tender phase – Tendering phase where you can send out information to potential suppliers, configure a response form to be filled out by the suppliers and evaluate responses received. The Tender phase can consist of any number of steps, for example first a pre-qualification phase and then any number of negotiation steps.

eAuction phase – A possibility to make the received quotes transparent among the suppliers, still with confidentiality.

Contract phase – Enables management of the contracts online. You can create a contract file, collaborate with the supplier and receive the formal acceptance.

You can either issue a Tender within a specific ”Project” or separately from a ”Project” (non-”Project” based procurement). When working within a ”Project” you get access to the ”Project” information management tools described in Section 3: Management of Information.

4.1 Initiate Tender process and create first Lot

The initiation process contains configuration of the actual process to be run and the creation of the Lots containing information to be distributed to the suppliers. The amount and type of information can vary between processes but the system allows for documents, data on data layer or general text descriptions.

4.1.1 Process alternatives

The following details/settings can be used within a Tender. These are set up by your system administrator in how they should work for a particular procedure. For example Restricted Procedure should be a PQQ/Qualifying phase with certain parameters and then Quotation phase with other parameters (price schedule for example). If you have chosen a simple 3 quote procedure you will for example not have to take any decision regarding the 10 day standstill as this setting should have been set as NO and hidden. But for over OJEU threshold it should be 10 day standstill on (IF you want to have the additional functionality that this entails such as automatic award message and possibility to dispute. It is imperative to be sure not to switch on functionality without knowing the full impact of it.

Setting	Description
Settings on main RFT level	
Standalone template	Only for information and documents NOT possible to express interest on.
Allow automatic addition of questions from template	Allow automatic addition of questions created the the questions/requirement library within company admin interface
Pre Qualification tender	
Mini-Quote tender	This is if you have the personalisation module switched on, it is not call-off/mini quote on framework agreemet.
Number of process steps	The number of process steps, use two steps if you want to start with a pre-qualification without quote information and then short-list suppliers to the quote step.
Include auction	Decides whether the RFT should end with an online auction, the auction is not counted in the number of steps. You can also create a template to include an auction only
Initial estimated value	Sets if the initial value should be used or not when using guidance, is not visible for suppliers
Currency	Currency of the FRT
Minimum Standstill period/ (Alcatel directive rules)	Within public procurement and EU, the Alcatel directive may apply to certain tenders. The Alcatel directive is a set of rules for how long between intend to award a contract and the actual awarding. The suppliers not selected are in a position to challenge the award within ten days and receiving a detailed report describing the award reason.
Enable selection of CPV codes from checklist	Use classification from the Common Procurement Vocabulary. Classifying your tender makes it easier to attract suppliers with appropriate expertise.
Enable quicker upfront definition of Multiple packages	If the tender will contain more than one lot/package, select this option. This will take the creator of the tender to an intermediate step where multiple lots can be created simultaneously.
DPS Qualification	To be used when you wish to create an Dynamic Purchases System process for the qualification phase, for DPS qualification also assure that you set following extra settings later on: Tender box – NO, Allow authority access to supplier responses... - YES
DPS Tender	To be used when you create the process for the actual tender phase within a DPS process using a specific previous qualification. Also assure that you set following setting “Enable selection of suppliers and invitation of those” - YES
Hide authority procurer´s user information in the audit train	This setting hides the procurer´s contact details from the suppliers taking part in this tender.
Hide supplier names for all user throughout the entire process (for design contest)	The offers/quotations will be shown “anonymously” hence the buyer should/will not see which supplier sent in the quotation as the supplier name will be hidden until the buyer/authority awards a specific quotation. Per default set as no and hidden
Hide Metadata Forms	There is a possibility to hide the metadata forms within the tender checklist. The setting are used as any other regular setting from the process template and can also be edited when creating the tender if the process allows editing of the setting.

	The setting is only available if the customer has the metadata forms module switched on
Publish qualified suppliers for DPS qualification	Show which suppliers are qualified openly on the DPS when people search for DPS qualifications
Prohibit Archive if not all contracts are signed	Archiving not possible at the bottom of the checklist if the contracts are not status final and signed.
Enable use of complaint procedure	Should the complaint procedure be available to use by each procurement officer in each tender created.
Set evaluation model	Define if the company or this type of tenders shoul have relative weighting or value added as evaluation model
Automatically make attached documents publically downloadable after response deadline	Make the tender documentation available public and poss to download after deadline has passed.
Settings for each step within the RFT	
General Keys	
Require supplier´s acceptance of standard conditions to enable access to any tender documentation	If desired you can include tender conditions that you wish the suppliers to accept. This is considered as separate from the response to the RFT and acceptance can be required either before access is given to the Tender information or as part of the response.
Allow suppliers to also make discount bid if awarded all of multiple packages	When using multiple packages within the RFT, the supplier can be prompted to set a discount bid, which will be a total discount price if the supplier is awarded for all the packages within the proposal.
Enable selection of suppliers and the invitation of those	Decides whether the buyer is allowed to search and invite suppliers. If this option is not selected suppliers will only be added through the publishing
Require supplier´s acceptance of standard conditions in attached documents	Unless alternative bid is enabled by the procurer in the process template the supplier will not be able to give any quotation without accepting the stated document, if supplier chooses to answer not compliant and the alternative bid setting is enabled the supplier will only be able to give an alternative quotation.
Minimum number of documents required to be attached by the supplier in order to submit	Forces the supplier to attach certain amount of documents that you want to be attached before he can make any submit. Submission unavailable unless same amount of documents attached that the procurer has stated.
Lock data after respons deadline	If you have this setting as Yes the consequence is that the procurement officer cannot change any of his own data efter the RFQ deadline. (such as QQ, documents etc) If any changes have to be made to the original tender documents the ETQ will have to be moved forward/opened.
Tender box keys	
Tender Box	The buyer can if desired set up a Tender box. Through using a tender box offers cannot be read until the box has been opened. When creating the RFT a set of keys can be specified that are required for the opening of the tender box.
Tender box opening delay	Amount of days that should take place after end time quotation before the tender box can be opened.
Minimum amount of listed users required to open the tender box	The procurer can use this key to determine which of the users and foremost how many of the users assigned to this particular project should open the actual tender box
Double envelope	The response submitted by suppliers is split into two parts with separation of the commercial and technical

	offer. Supplier offers cannot be read until the envelopes have been opened.
Allow authority access to supplier quotations/responses before deadline	Any quotations received are displayed directly when received unless tender box is used.
Automatic e-mail (issue of minutes of opening) sent to suppliers upon tender box opening	Upon tender box opening the system send an e-mail to all suppliers informing them of this.
Proposal submission key	
Require explicit total price quotation (besides any PS/BoQ pricing) in bid to enable supplier submission	This setting will force the supplier to give a total price in separate place irrespective of if there is an Bill of Quantity/Prise Schedule attached with a total or not.
Allow late submission of proposals ie after deadline for step	By default all suppliers are locked upon End time Quotation (ETQ). Through accepting late offers the buyer allows suppliers to send in offers also after ETQ and manually controls the locking of suppliers. Suppliers can make changes until locked by the buyer. (All proposals will however be time stamped)
Allow supplier download of docs prior to accepting invitation	Allowing the supplier to download documents prior to accepting the invitation of the RFT, if not selected the suppliers will only see a list of documents prior to accepting the invitation.
Allow suppliers to revise their quotation	The suppliers are allowed to update a quotation once sent and re-send the quotation. It is the latest sent in quotation that will be used.
Enable Encryption of supplier proposal	The encryption and offline editor is a way for the buyer to protect themselves from the CTM system provider. When selecting this option, the supplier has to download an offline editor and creates his proposal in that application. When submitting he uploads the whole proposal to the site including his public encryption key. To see the proposals the buyer has to decrypt with his private key.
Allow suppliers to start working on their proposals after accepting their public invitations	Allow suppliers to start working on their proposals after accepting their public invitations
Disable submit of alternative bid	This setting gives you the possibility to disable submission of any alternative pricing/bid, (should you also have entered any compliance documentation that the supplier would not comply with then the result of this setting enabled would be that the supplier cannot

	make any submission)
Disable submit of online proposals	Should per default be NO as this setting stops any online submission.
Show supplier progress bar(supplier side)	Enables the supplier to see his own progress in answering the quotation by showing the green amount of percentage completed tender bar.
Show supplier proposal progress (buyer side)	The status of each supplier with the response is displayed to you before the ETQ has been passed. This gives you insight of if a supplier has started working or not ▪ Show progress – Allows the buyer to see all progress made by the supplier, such as answering the invitation, setting prices to BoQ-items, answering questions etc. this progress is shown in the audit trail. The actual prices or answers are shown. ▪ Show downloads – The buyer only sees if the supplier is viewing information such as the invitation or documents. ▪ Hide progress – Hides all the progress with the supplier progress, the buyer cannot even see if the supplier has submitted any quotation or viewed the invitation.
Bill of Quantities/Price Schedule keys	
Request pricing of items in bid	Suppliers are requested to fill in BoQ prices. The authority procurer has to create items for the supplier to price
Require pricing on all attached items	The supplier must fill in prices on all items prior sending his quotation, he will not be able to send empty rows unless specifically entering that a row is included or excluded
Allow supplier to add own items to BoQ	Allowing the supplier to amend the BoQ list with own created items
Evaluation keys	
Enable manual update of category status after evaluation	If desired the supplier database can be split into various categories. If this setting is checked the process includes a step for update of this category status.
Use two step evaluation(qualification and evaluation for example in one step procedure)	Evaluation is split up in two parts where all gateway questions answered are first part- those suppliers that do not comply with gateway will not appear in the second evaluation in analytics engine.
Allow evaluation of single supplier at the time only.	With this setting you will not see all the supplier answers side by side but only one supplier at the time in both qualification view and analytical engine view.
Use strict evaluation	The team that is involved with the procurement is not allowed to do any evaluation; the evaluation must be made by another

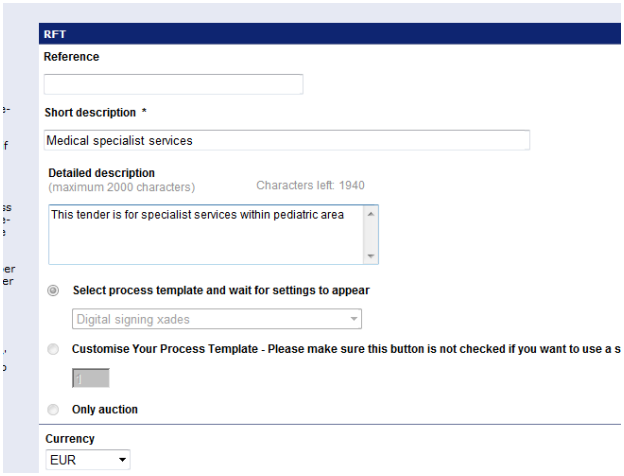
	evaluation team. None of the supplier names are shown during the evaluation process. All this to assure completely un bias evaluation.
General publication keys	
Publish on client public site	Setting if the RFT should be published or not on the local CTM-site (Should preferable never be set as Hide if Yes)
Publish notification. External sites	CTM supports exporting and direct publishing to third-party publishing sites. CTM will take care of sending the publication to the following publishing sites: • OJEU (Official Journal EU) – The common publish place for all of EU, all public entities within EU have to publish the RFT to OJEU, if above threshold value. For the OJEU notifications CTM currently support Form 2 (Contract notice) and Form 5 (Contract notice – Utilities) • BOAMP – BOAMP is the French equivalence to OJEU, when publishing to BOAMP, the publication will be sent from BOAMP to OJEU • Udbudsvagten – Danish equivalence to OJEU, when publishing to Udbudsvagten, the publication will be sent from Udbudsvagten to OJEU • Doffin – Norweigian national publishing site • TenderNed – The national publishing site in the Netherlands This setting should preferably never be set as Hide (if Yes) due to fact that if any mistakes are made in contract notice you will not be able to go back and edit.
Minimum lead time between publication and response time	This setting automatically guarantees certain minimum amount of days set in creating the tender between publication and end time quotation/deadline for allowed response.
Publish awarded supplier on client public site	Once the awarded supplier is selected you can choose to publish the awarded supplier. This can help third-level suppliers in finding quotes
Publish supplier award. External sites	Same as for the notification publication, CTM supports publication and integration • OJEU (Official Journal EU) – Within OJEU, CTM currently has the support for Form 3 (Contract award notice) and Form 6 (Contract award notice – Utilities)

4.1.2 Create Tender with a single process and a Lot

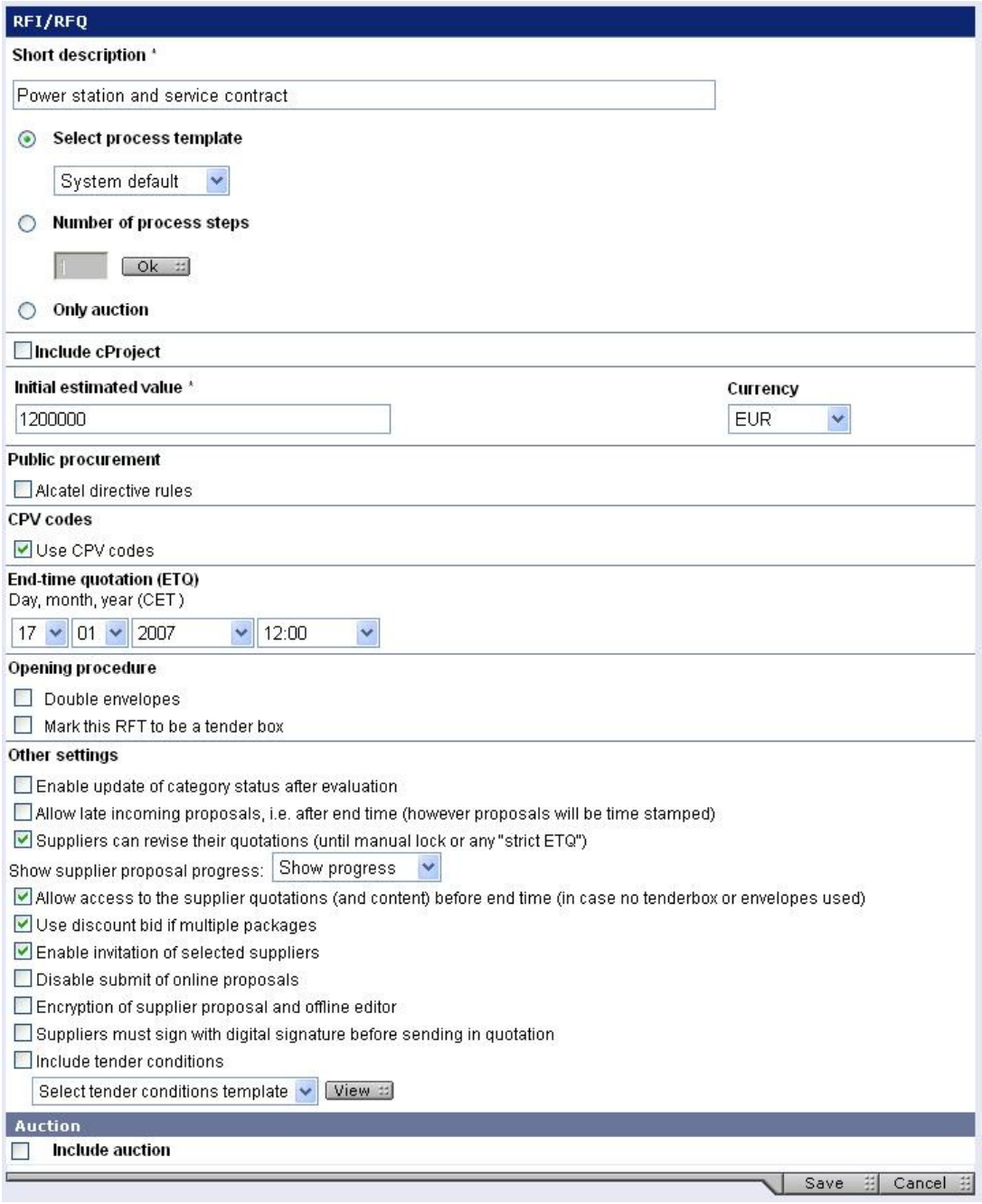
Initiate process:

1. From the home page, click on My Request for Tenders link (Buyer services). The My Request for Tenders screen displays.

2. Click on the [Create TENDER] button within the ”Project” or, if not ”Project” related, within the non ”Project” related area.
3. Enter a reference (not mandatory) this reference will be part of the short description of the tender.
4. Short description is the tender name advertised and visable for all parties.
5. Detailed description (not mandatory) is shown as an overall description for the entire tender, (not on lot/package level)
6. Select the desired **one step** process template



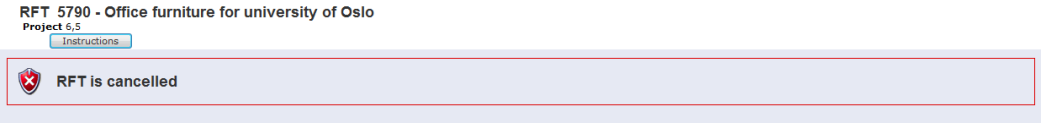
The page is reloaded and the different phases and the settings for each phase are displayed. Depending on configurations made by the company administrator settings may be editable or not. Some of the settings can have been set to hidden by the company administrator, and is not displayed to the creator of the Tender. (table above)



Click on the [Save] button when finished with all settings. The Tender has now been created, including the first Lot, and Edit Tender checklist is displayed containing all the steps that are to be performed for this Tender. On the right hand side you have the below checklist in workflow order, and on the left hand side you have links to different functionality that to some extent also can be reached from the tender main page, such as create message, Task management, Notify of changes etc, remove suppliers etc. There is also an “Instructions” button with some help text regarding this page.

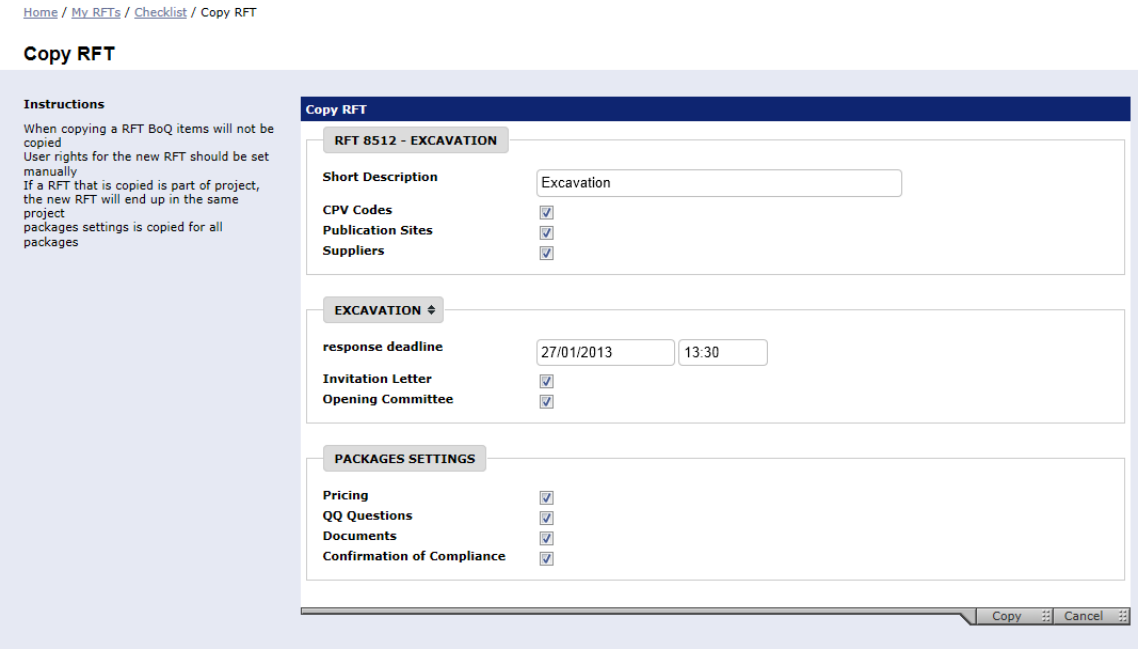
See left hand side of the checklist screen – Administration part where you can perform several tasks-this is not in any workflow order but simply activites possible during entire process. At the bottom of the administrationscreen you can cancel a tender, delete it and copy it.

If you cancel the RFT it will be clearly marked



On your list of tenders it will have the cancelled icon

The tender will not be shown on the public tender list within CTM after cancellation.
You can only delete a tender if no suppliers have been added or entered.
If you copy a tender you will be abel to chose if you want to copy the whole tender or specific parts of it.



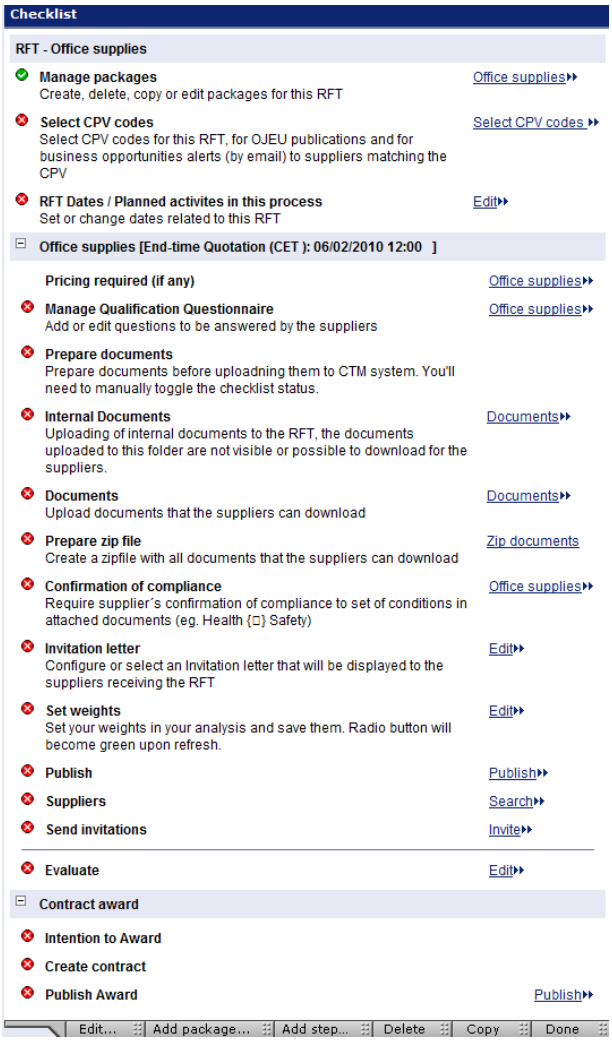
You also have the possibility to directly set the tender deadline of the new tender.

The parts of the tender not listed in this page are not copied to the new tender.

NOTE!
Publications to TED, Udbudsvagten and Doffin must be cancelled manually by the contracting authority. The integrations for those sites do not allow any automatic cancellation/with-draw of a publication. A publication to TED can be cancelled by using amendment notice.

Publications to Tenderned will be automatically with-drawn from the TenderNEd publication site

Example of right hand side checklist, look depending on selected modules etc.



At the bottom of the checklist you can: view the tender, edit the tender settings if any are available to edit, Change owner of the tender, Add lot/package and Add step if a several steps procedure.

Create Tender with several steps

Initiate process:

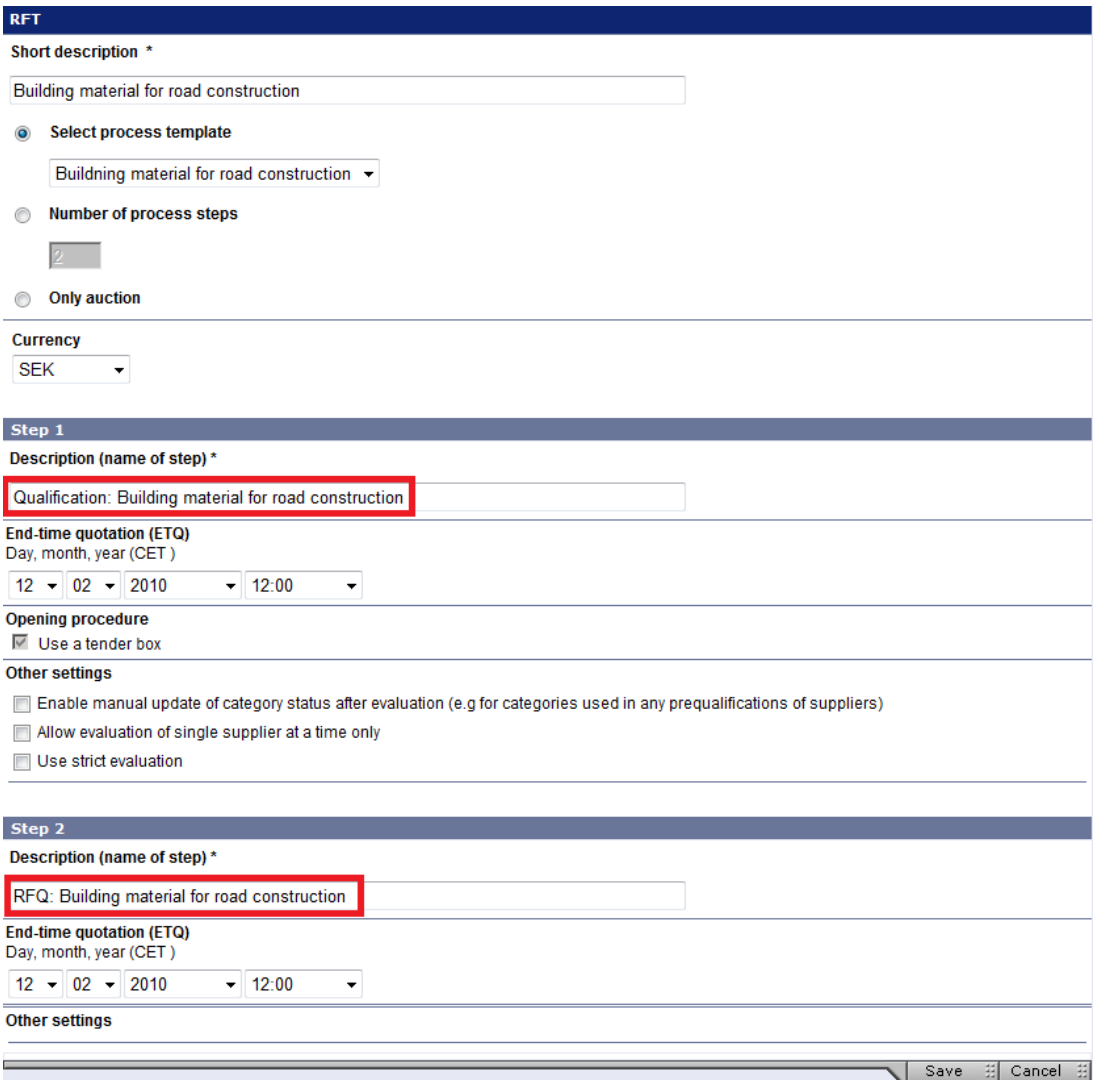
1. From the home page, click on the My Request for Tenders link. The My Request for Tenders screen displays.

2. Click the [Create TENDER] button within the ”Project” or, if not ”Project” related, within the non ”Project” related area.

3. Select the desired **multiple step** process template

4. The page is reloaded and the different phases and the settings for each process step are displayed. For easier handling it is recommended that you separate the process steps by changing their names.

5. Click on the [Save] button when finished with all settings.



The Tender has now been created, including the first Lot, and Edit Tender checklist is displayed containing all the steps that are to be performed for this Tender.

The difference between a single step process and multiple process steps:

When using two process steps you are able to qualify suppliers separately in the first step. The checklist will contain all steps after eachother. After suppliers have answered the PQQ in step one it is possible to evaluate which suppliers that should be invited into the tender step.

4.1.3 Editing the Tender and setting up response

The checklist is the edit page as well as a page for seeing the steps to be done within a Tender; some of the steps are steps to be completed outside CTM. Each of the steps is optional, and does not have to be filled in. When a step is filled completed the marker in the checklist turns green. You can set it back to pending (yellow) by clicking the image, and also set not completed tasks to green to mark a completed task.

Manage Lots:

You can here add and edit existing Lot, Lots contain the information to be filled in by the suppliers, e.g. prices for Bill of Quantities, Qualification questionnaires, documents and a total quote. Using the Lots will allow you to split up the Tender in different parts where you are requesting different prices, but still are inviting the same suppliers. For more information about Lots, see section 4.1.5.

Please note that it is important to enter more detailed description regarding your procurement. In here you have space of 500 characters to enter detailed description text, to make it easier for the possible supplier to choose to participate. This text is shown at early stage of the publication/invitation of the tender.

Assign team

You can assign team members to work with this Tender (only applicable to Tenders outside a ”Project”, for Tenders within a ”Project” all team-member administration are administrated on ”Project” level). Members can be given editor or viewer rights depending on what type of tasks they will be performing within the Tender. See the ”Project” section above for more detailed information. You can also change the owner of the tender.

NB This option is only available when creating a Tender outside of a ”Project”. Otherwise, the management of team members is performed for the entire ”Project”.

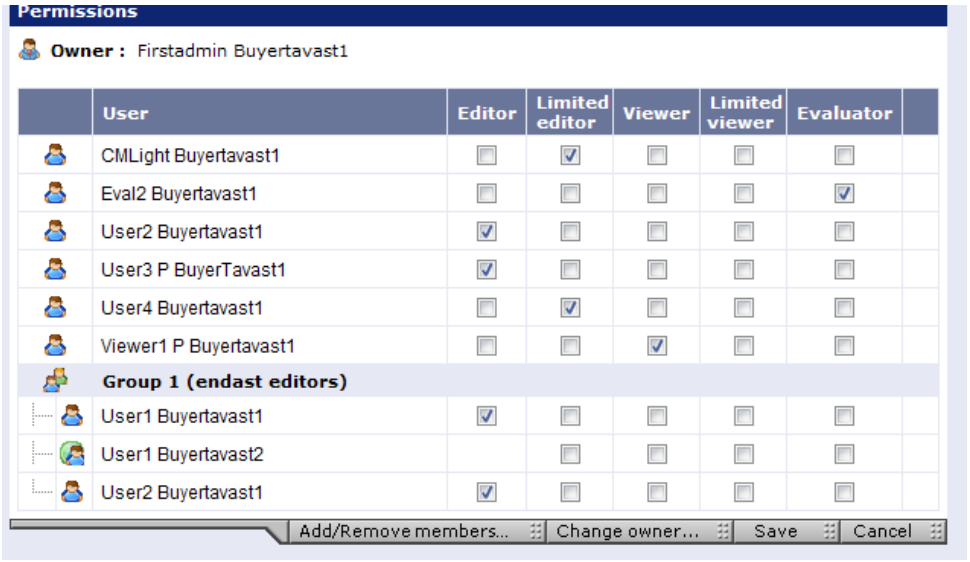
1. On the Edit access screen you can see which team members can access the Tender. If there are no members in the list or if you want to remove members, click the [Add/Remove members…] button.

2. In the left box the available team members are listed. By selecting one or more members and clicking the right arrow button, the users are assigned to the Tender.

3. Click the [Save] button to save settings and return to the Edit access screen.

4. Check the appropriate box whether the user should have Editor, Viewer or Limited viewer rights. Then click [Save] to store the settings.

5. Once you have different members on your list you can also select to change owner of the enire tender.

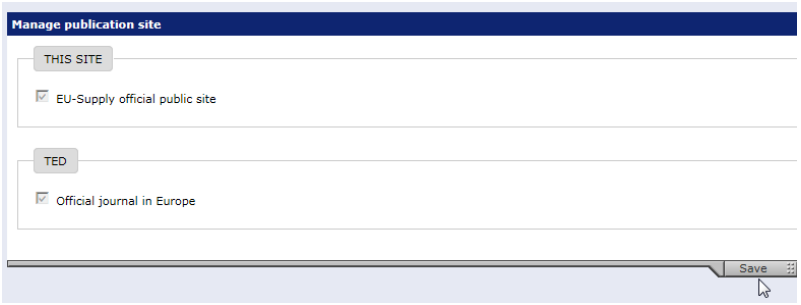


Set message recipients

1. Click on Set message recipient
2. Select which ones of the team members should receive both system messages and direct messages from suppliers regarding this tender. If you do NOT select anybody the message will only be sent to the creator of the tender

Manange Publication Sites

You can here select the publication sites IF your system admin has set the template up in such a way, otherwise it is already predefined and you need not to do or save anything. Subsequently if selection is preticked and not possible to change then predefined by admin otherwise you can tick or untick and finally Save.



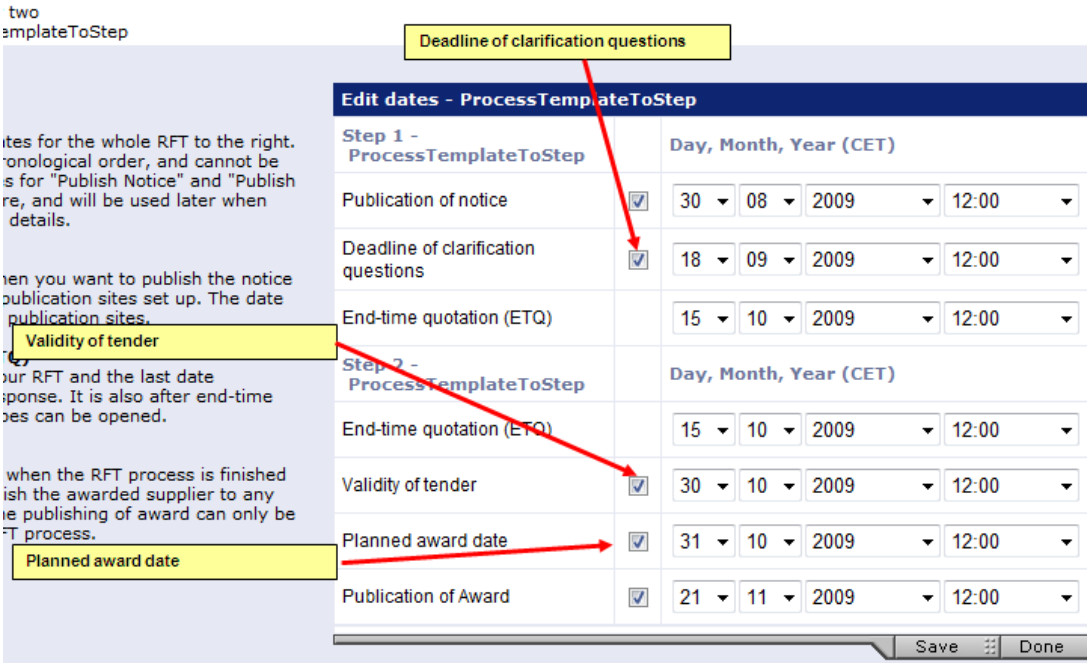
Tender dates

From here you edit all the dates relevant to the Tender, end-times, publishing etc.

1. On the Edit dates screen, select which dates to use by selecting the check-box. If you have created an Tender from a template you may be obliged to fill in some of the dates. Enter the dates and click [Save].

2. You also have option to set some dates for information purpose towards the supplier.

    a) Deadline of clarification question: deadline for supplier to send clarification questions to owner of the tender
    b) Validity of tender: For how long the buyer wants this tender/answer to be valid
    c) Planned award date: the estimated date for tender to be awarded



Setting the CPV-codes:

Within EU the standard to categorise a public Tender is the CPV tree (Common Procurement Vocabulary). Each public Tender should be tagged with one or more CPV codes.

1. On the add CPV codes screen, click the [Add] button. The CPV is displayed in a pop-up window.
2. Select one or more categories for your Tender. Scroll down the list and go further down in the tree to find the exact category.

3. When finished selecting, click the [Save] button at the top. The window is closed and the screen below is refreshed and the selected categories are listed. Click the [Done] button to go back to the checklist.

4. If you are uncertain of which CPV code you need, simply enter a search word in the search string field to get some options from the system.

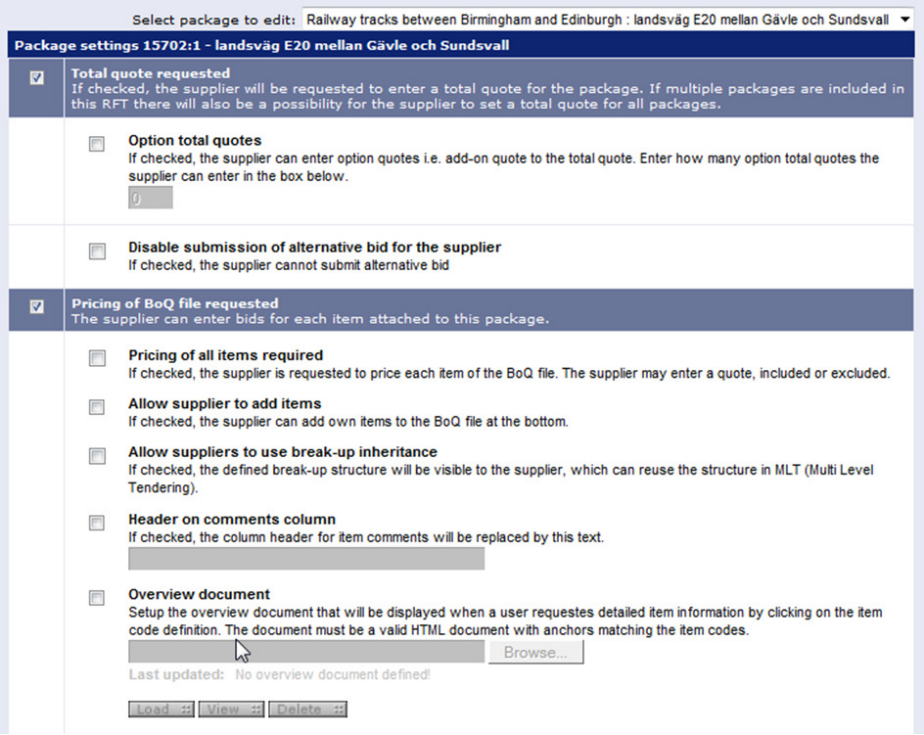
Print shops

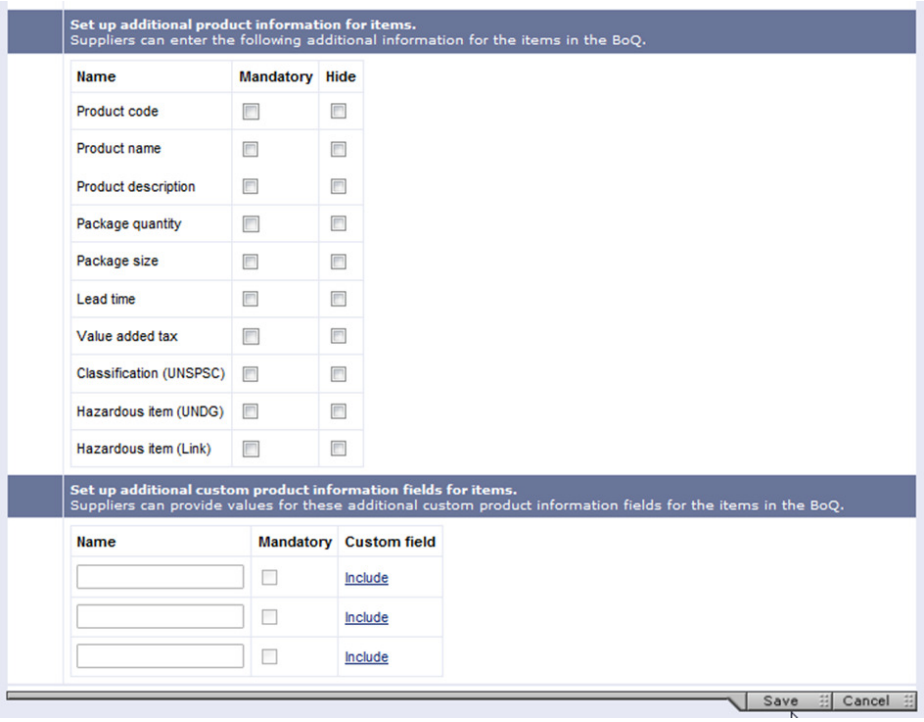
Print shops can be set up for use with the Tender. For further reference see section 3.5.

NB This option is only available when creating a Tender outside of a"Project". Otherwise, the management of print shops is performed for the entire "Project".

Selecting requested pricing:

Click on the link by the Pricing required section to make changes to the pricing requested.





The following configurations are available:

- **Request Total Quote from supplier –** IF you select total quote per lot and you have a tender with several lots the consequence will be that the suppliers will have to price at least one lot in order to be able to submit.

- **Optional total quotes –** The supplier can fill in any optional add on quotes to the total quote. When entering quotes the buyer can use these to add to the total quote received from the supplier

- **Disable alternative quote –** By default suppliers has two fields for entering total quotes, one for a fully compliant quote and one for alternative quote i.e. a total quote that does not cover all the requirements. You can here disallow the supplier from entering an alternative quote not fulfilling all the requirements.

- **Pricing of BoQ file requested –** request a priced bill from suppliers, this option requires you to upload a list of BoQ items to the Tender for the suppliers to price

- **Pricing of all items required –** requests suppliers to price all items within the BoQ, suppliers cannot submit a proposal until the all rows are priced.

- **Allow supplier to add items –** decide if suppliers should be able to create own items or edit existing items or not. Suppliers can if permitted create own items or create substitutes for existing items.

- **Allow suppliers to use break-up inheritance –** if any break-ups added to the Lot, allowing the supplier to see them and re-use them in a multi level tender.

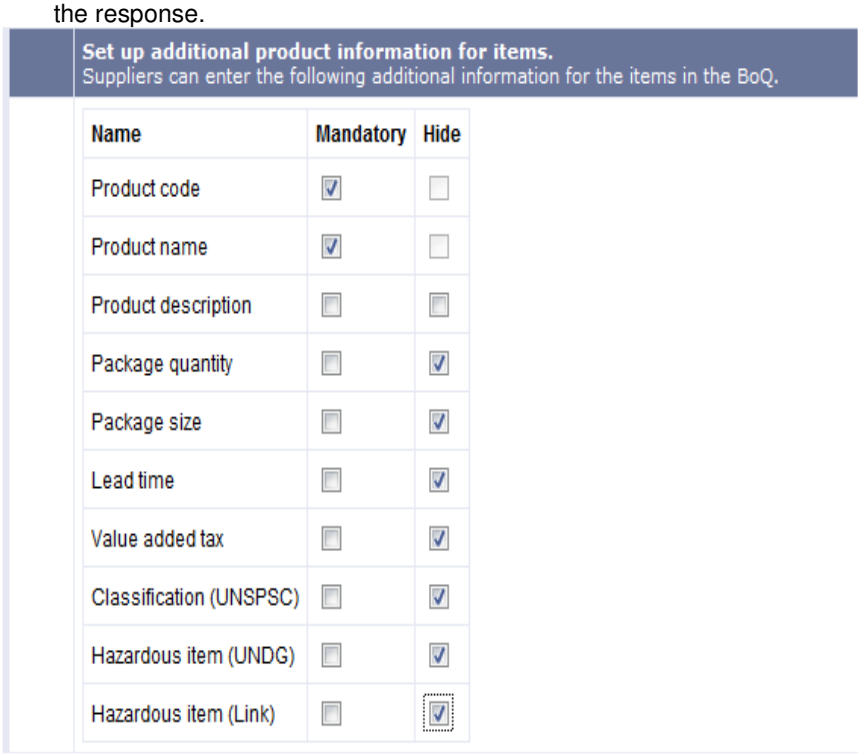
- **Header on comments column –** Set the header for the comment field to be something other than “comment”.

- **Overview document –** Upload of an HTML-document with links to each item code. The supplier will be able to click a link of the item code and open the HTML-document at the correct position with more details about the item.

- **Set up additional product information for items**

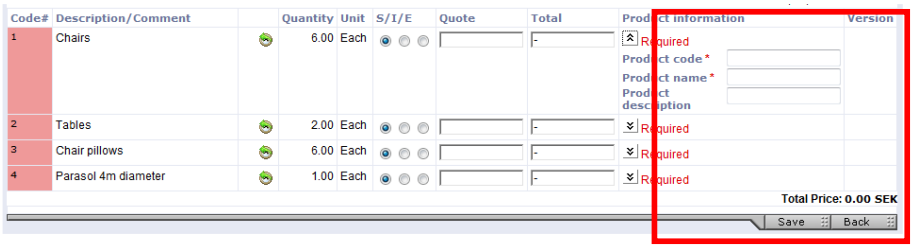
  The changes in these settings will be logged in the audit trail with a new audit action “Product information settings for BoQ have been updated”. If any changes take place after any supplier has registered interest in the tender, the ‘Changes not notified’ warning is displayed to the contracting authority.

  The product information fields can each be selected as hidden or mandatory. Hidden fields are not shown to the supplier and cannot be priced. Mandatory fields are treated as mandatory requirements and will give suppliers warnings at submission if unfilled, but they will not prevent the supplier from submitting the response.



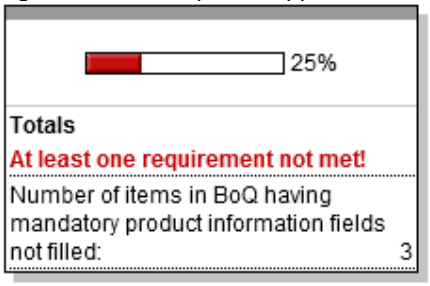
Setting up mandatory or hidden fields

The supplier will get notification about which fields are mandatory, the down arrow is marked red if there are mandatory fields and the mandatory fields are marked with a red star.



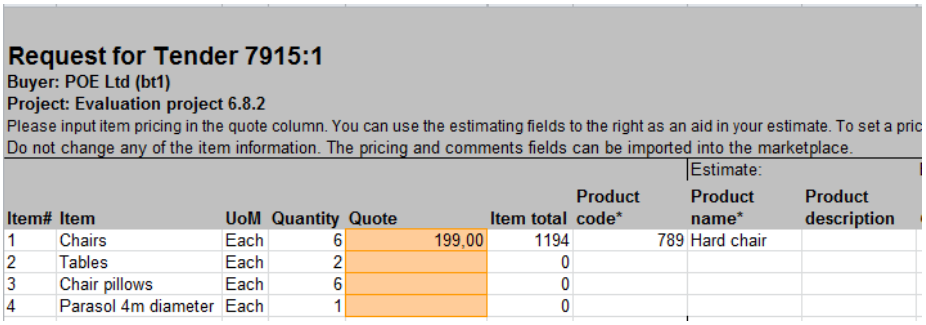
Supplier online pricing

The supplier also gets a warning about the mandatory fields in the main response page. It will not stop the supplier from submitting a response.



Warning

The offline pricing Excel includes the product information fields, the mandatory ones are marked with a star.



Request for Tender 7915:1

Buyer: POE Ltd (bt1)

Project: Evaluation project 6.8.2

Please input item pricing in the quote column. You can use the estimating fields to the right as an aid in your estimate. To set a pric
Do not change any of the item information. The pricing and comments fields can be imported into the marketplace.

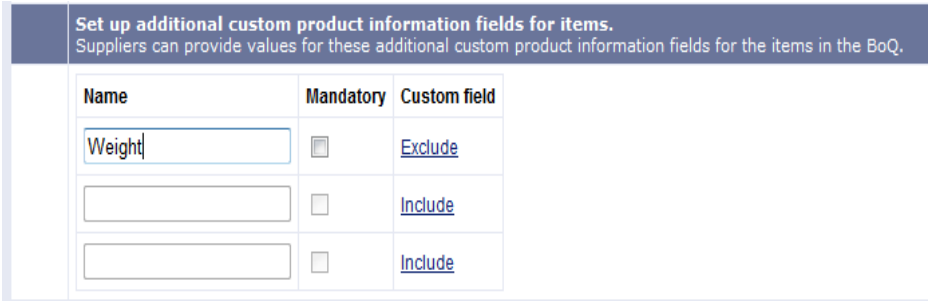
							Estimate:	
Item#	Item	UoM	Quantity	Quote	Item total	Product code*	Product name*	Product description
1	Chairs	Each	6	199,00	1194	789	Hard chair	
2	Tables	Each	2		0			
3	Chair pillows	Each	6		0			
4	Parasol 4m diameter	Each	1		0			

Offline pricing

If the supplier tries to import a file exported prior rel 6.9.1, he will have to download a new file from the server with the new format in order to import. The supplier will be displayed with a warning.

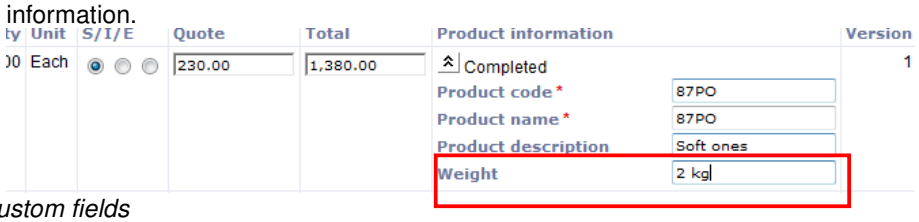
When evaluating the supplier prices, the warning about not properly filled production information is shown in the BoQ comparison page.

Set up additional custom product information fields for items It is possible to define up to three custom fields for which the contracting authority can request the suppliers to fill in additional information. The contracting authority can mark these as mandatory in the same way as the product information.



Setting up custom fields

The custom fields are shown to the supplier in the same manner as the product information.



- *Pricing custom fields*

1. To change the settings, check the appropriate boxes.

2. Click on the [Save] button to save the settings.

Lot categories:

If the company administrator for the buyer has uploaded a category tree including questions, a category can be added to the Lot with questions. To upload a category tree within the buyer profile, contact your local support for more information.

1. Click on the link in the checklist for categories. The categories screen is displayed.

2. Click the [Add…] button. A pop-up window with the category tree is displayed. Select one or more categories for your Lot and click [Save] at the top. The pop-up window is closed and the screen below is refreshed.

3. Categories added are shown in a list, click on the View questions link to see the questions for each of the categories added. When done, click the [Done] button to go back to the checklist.

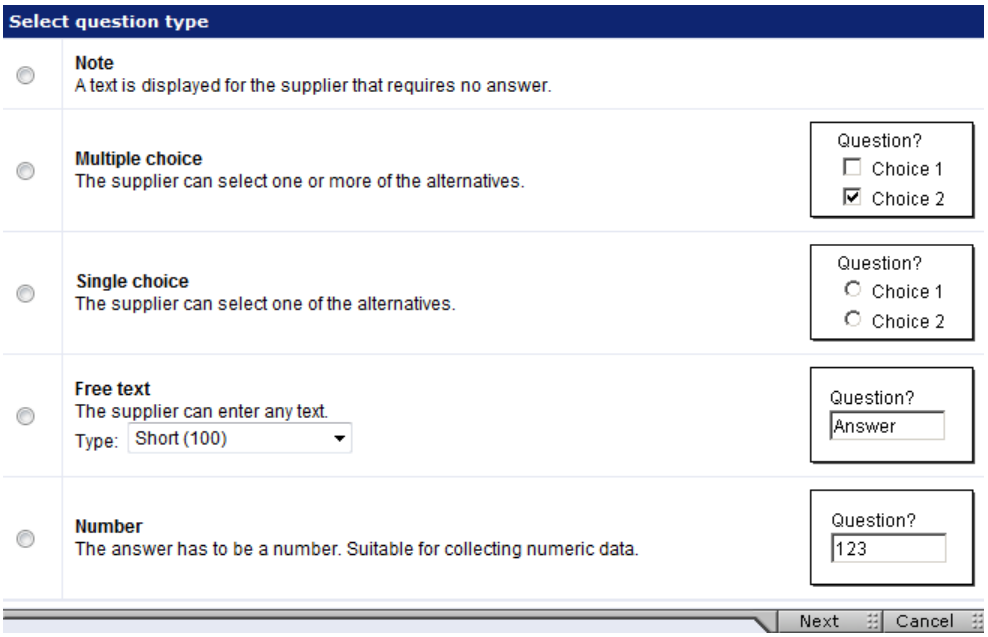
Adding qualification questions:

Qualification questions are the list of requirements for the Tender; here both gateways (mandatory requirements) and any other criteria can be specified. Questions relevant to the Lot can be added for the supplier to answer. Questions can be added from a predefined template or added directly to the Lot. Go to the link of the questions for the Lot. If any category containing questions already has been

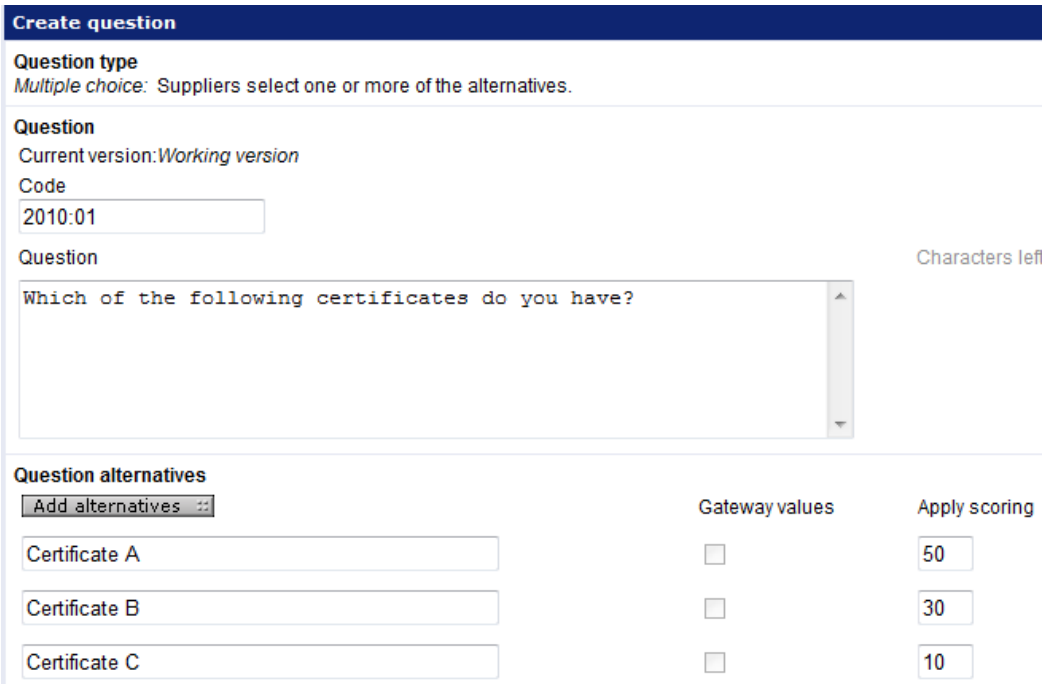
added, a list of questions is displayed with the added questions. When creating a question it can be maximum 5000 characters.

Creating questions directly on the Lot:

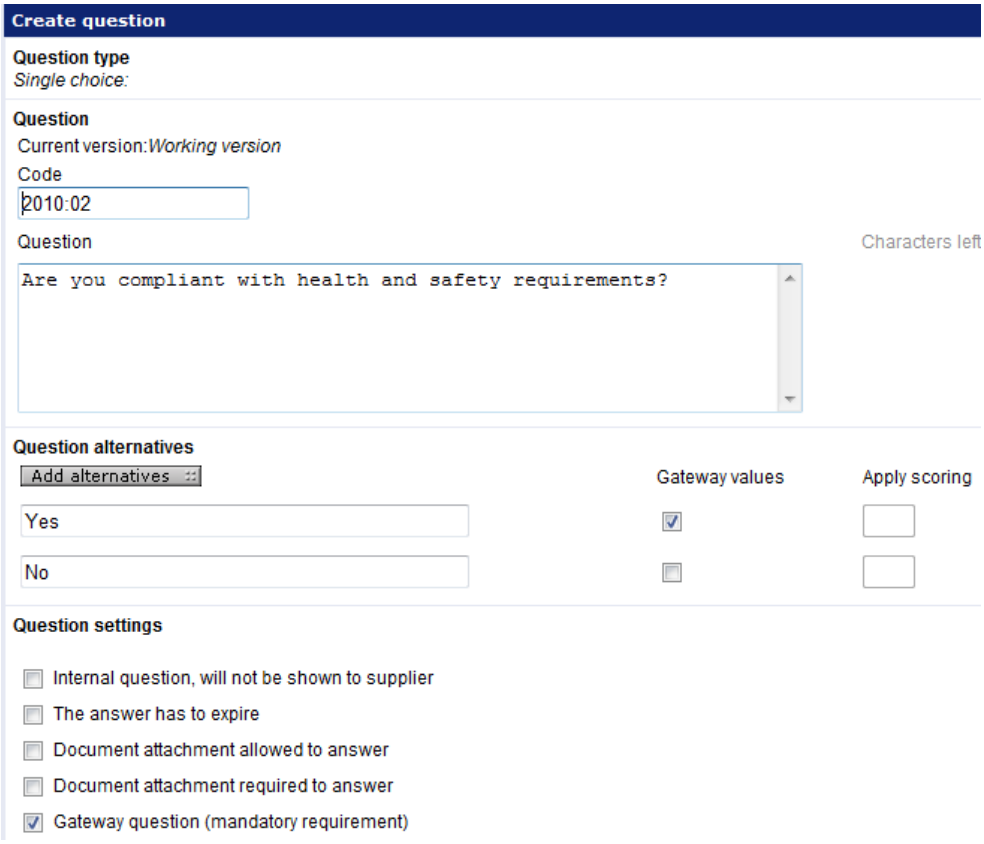
- Click on the [Create question…] button
- Select a question type and click [Next].



- Note is an information text that can be used as extra information to the suppliers.
- For Multiple and single choice questions you can set autoscores that will be automatically counted as points into the analytics engine when evaluation process starts. Please note that gateway questions cannot be autoscored as they work on the presumption in or out.
- Multiple question can be used if there can be more than one answer. The sum of scoring must be maximum 100.

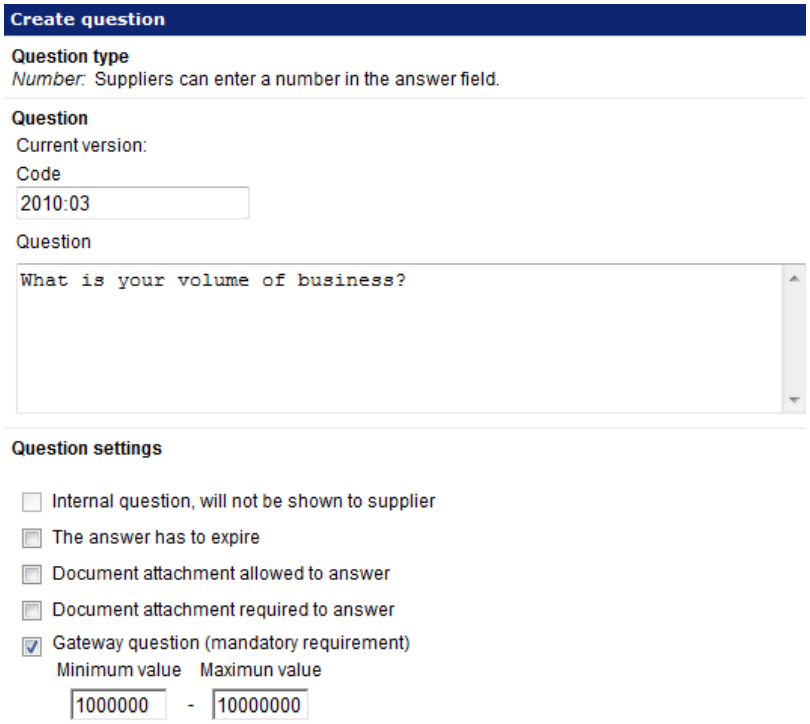


- Single choice question can be used if there only can be one answer. If you are using this as a Gateway question, remember that Gateway should only be used at one of the alternatives.



- Free text question can be used if you can't give the supplier any alternatives. They can be short text (100 characters) or long text (2500 characters)

- Number question can be used if the supplier should be answer in numbers. You can choose to make this a Gateway question and add a minimum and a maximum value.



More choices that can be made at the bottom of your questions:

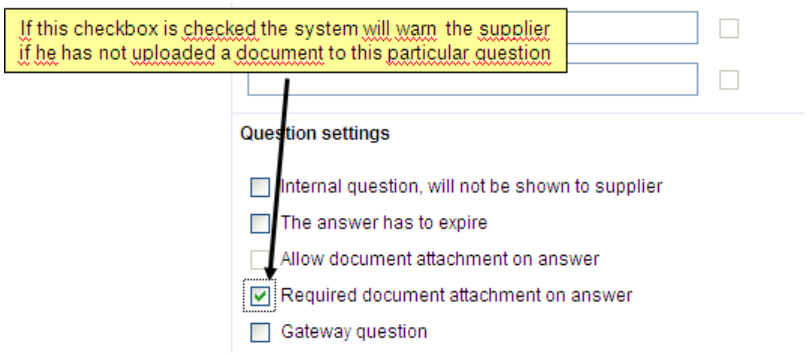
Internal question – The question is not shown to the supplier, can be used as a group scoring and weight for a number of questions.

Answer to expire – When answering the supplier has to set a date for the answer is not valid any more.

Allow document attachment – The supplier can upload a document as part of his answer

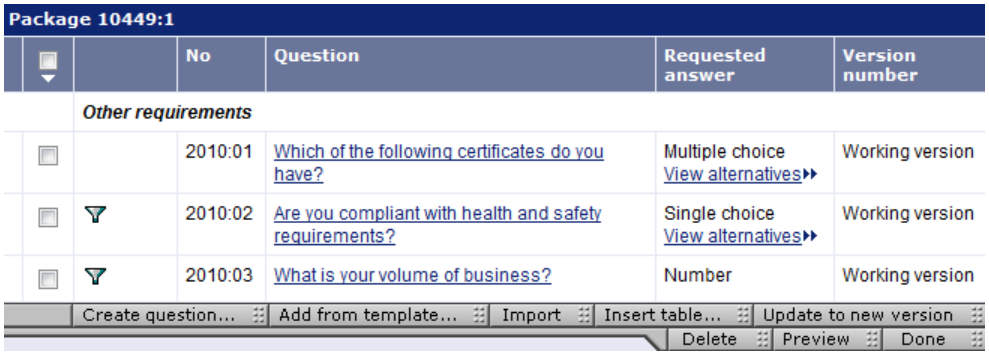
Require document attachment – The supplier must attach a document with the answer to the question

Gateway question – Only for number or choice questions, one of the choices or a numeric scale where the supplier has to be within the correct range. These types of questions are also called as "knock-out" criteria.



- Click [Save] to save the question and go back to the list of questions.

- Questions created are now created as a draft/working version and will not be visible to supplier until updated to a new version. Any changes made to any question will also be saved in a draft version and not seen until push of the new version is made.



- Push the changes by selecting the questions to update and click the [Update to new version] in the questions list.

Insert table questions:

- Table question is a question type where you have question rows and columns. The row is an ordinary question, and the supplier can enter different answers for each column on the row.

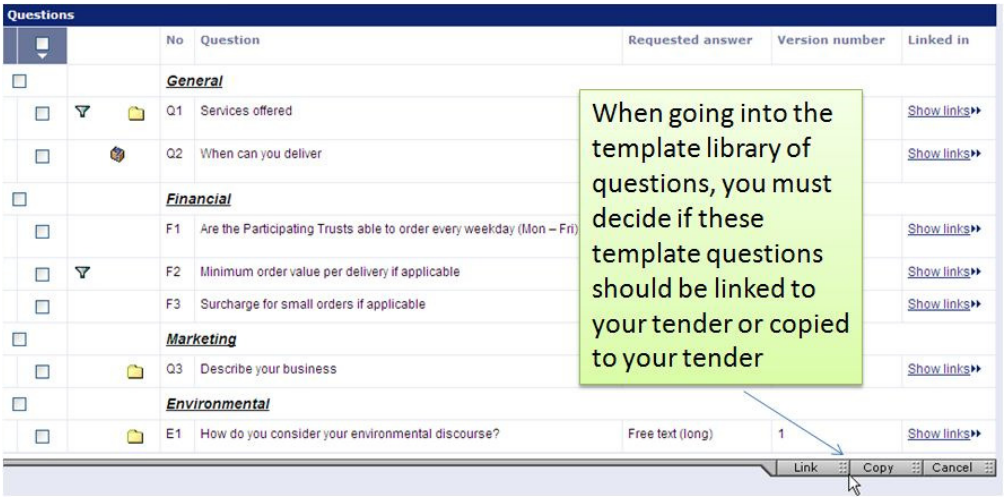
- Click the [Insert table…] from the question list to start creating a table question

- Enter the main table question name and click [Save]

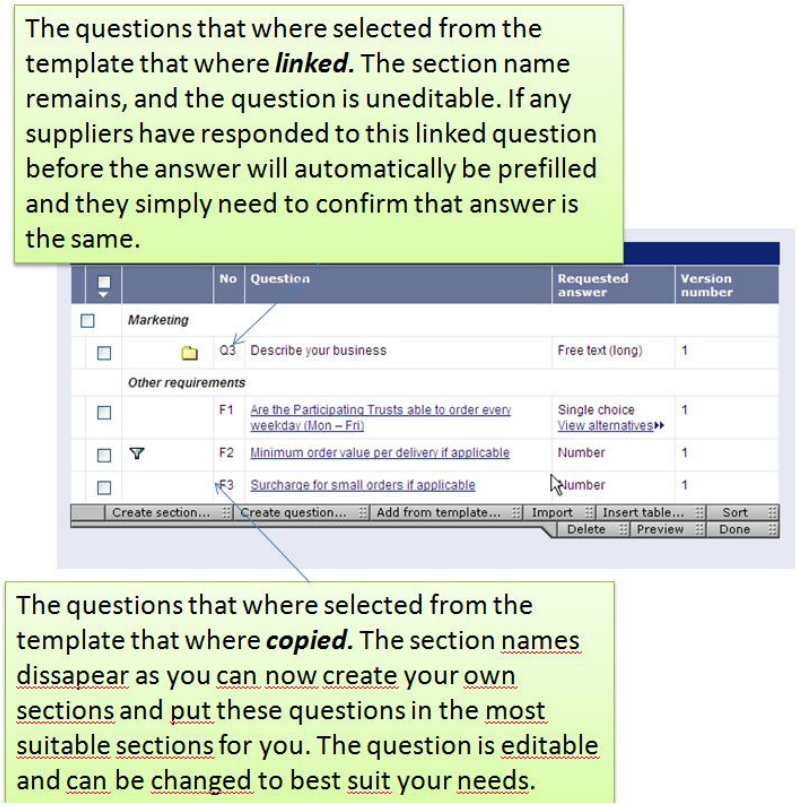
- Use the [Add row…] and [Add column…] buttons to enter rows and columns to the table.

Add questions from a predefined template:

- Click on [Link…] or [Copy…] button



- The list of questions within the template is displayed, select the questions you want to link or copy into your tender.

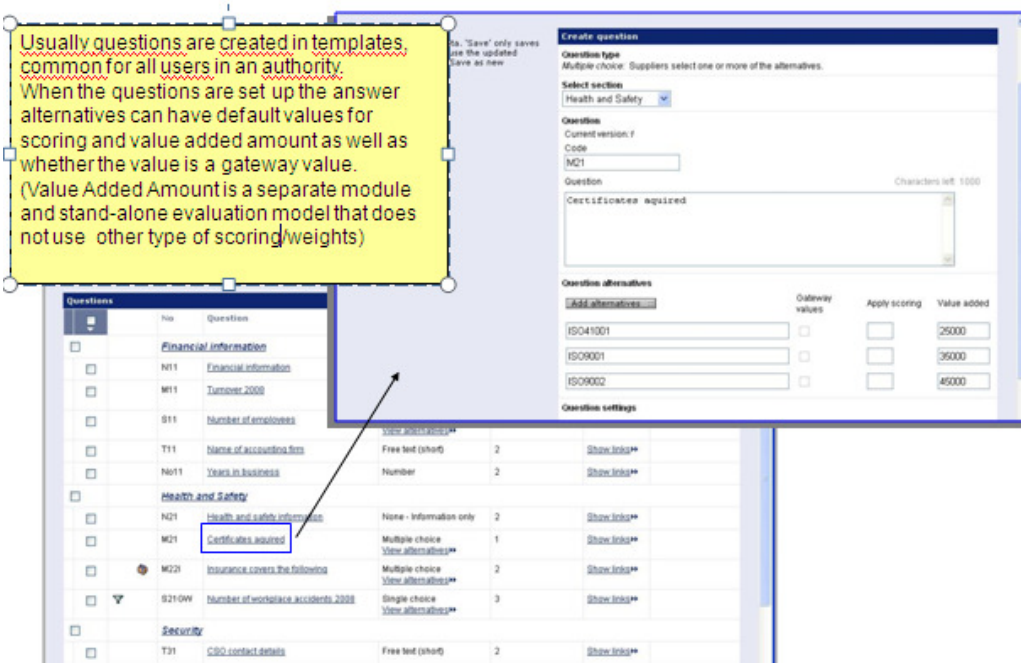


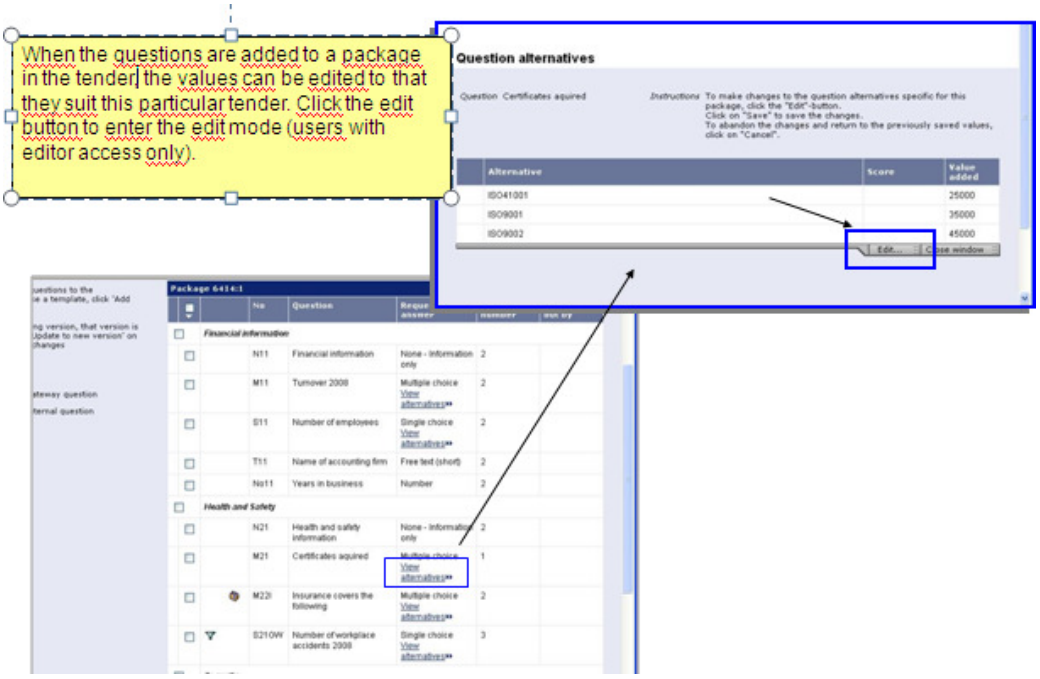
When ***linking questions*** from a set template that come from a company library these questions are NOT editable, with exception of the autoscoring values and value added values (separate module) and if gateway(mandatory) question or not. To edit any template questions value – please read the following text.

When creating the template questions, for certain questions such as single choice and multiple choice scores, gateway values and value added amounts can be set up. If the procurement officer wants to link a question from the templates to his

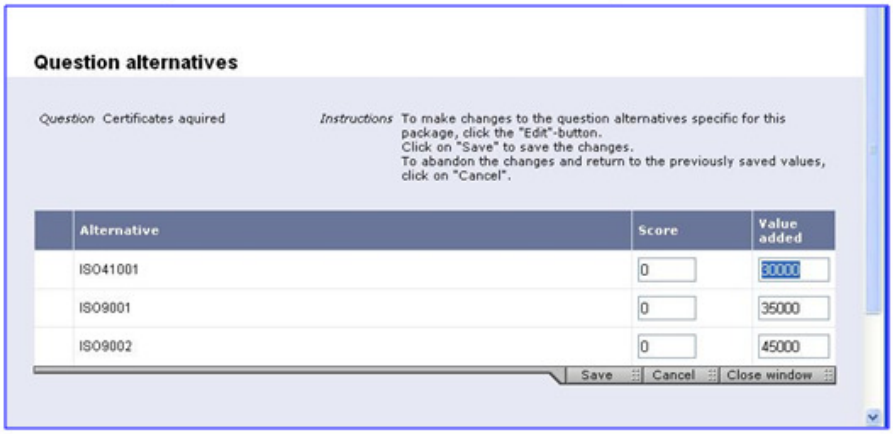
tender and needs to change any scores from the template or if you wish for a particular question to be gateway or not it can be made as below:

Please be aware that when copying a Lot, or a complete Tender, if questions are selected to be copied they will be copied with their default values and not any changed values.

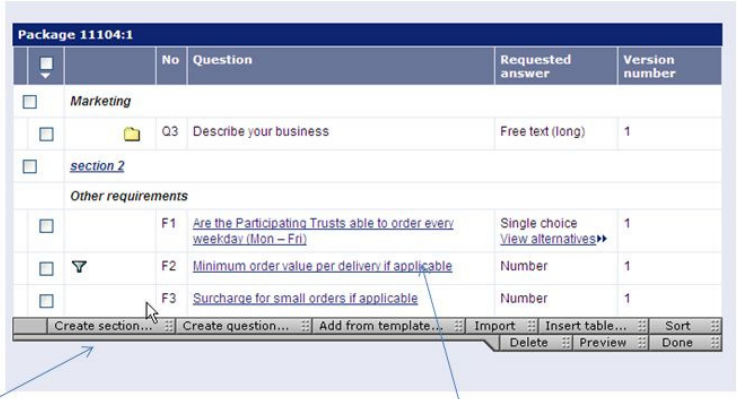




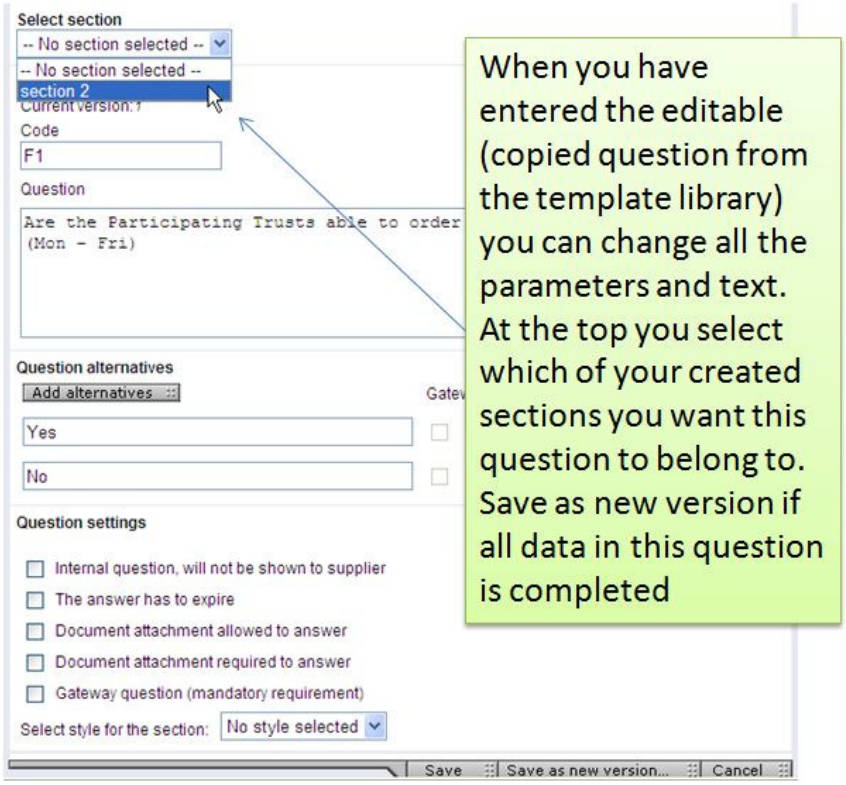
Edit the score values and/or value added amounts so that they are appropriate for the current tender. Click on Save before closing the window.

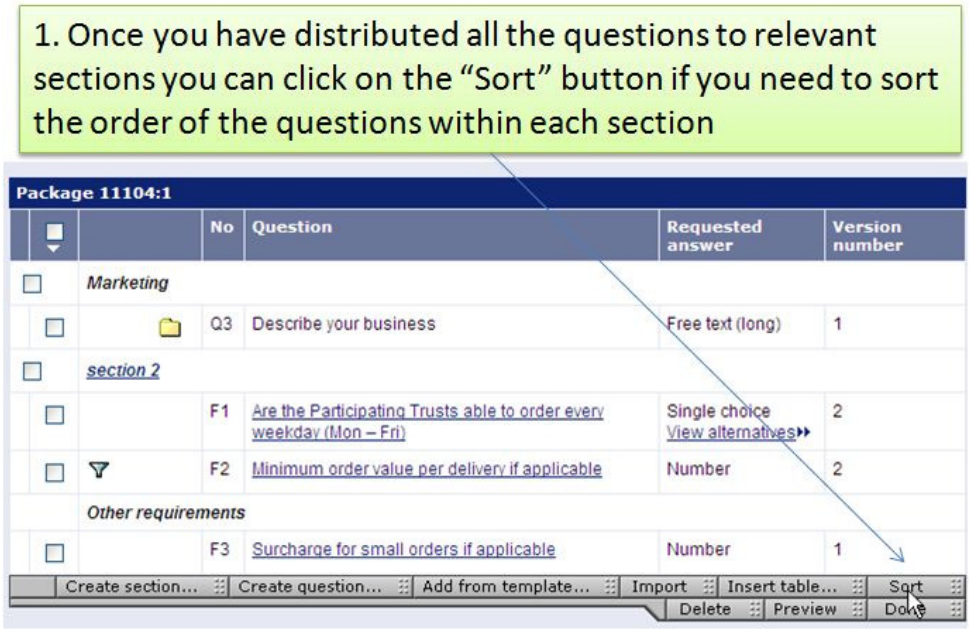


If you have copied the questions from a question template/library to your tender and lose your template sections this is how to continue on the tender level to create your own sections and distribute the copied questions into relevant sections

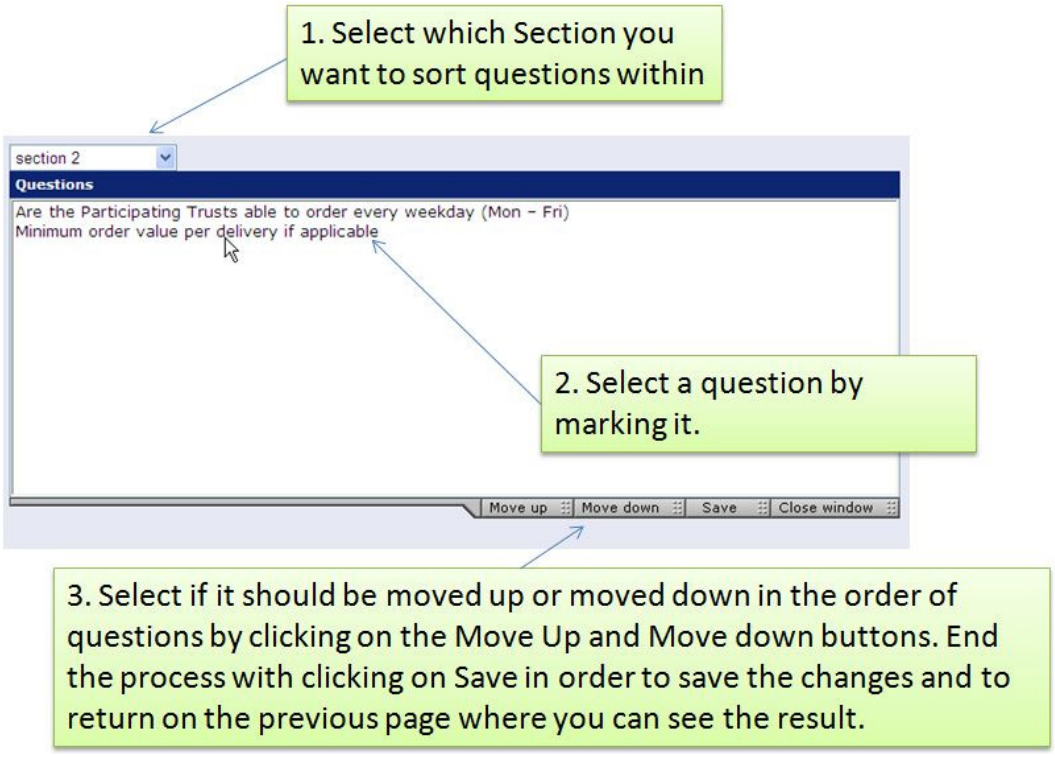


You create sections by clicking on the button "Create section" once a section is created (see above *section 2) you can click on the relevant editable question and select which section this question should be moved to.*





When in Sort mode "Rearrange questions page" do as described in picture below:



Importing questions:

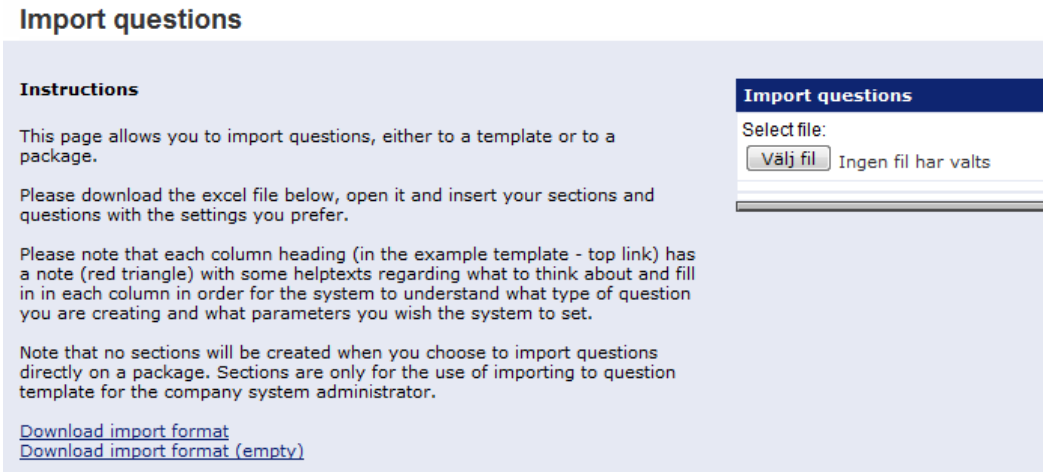
- Questions can be imported from a generic Excel. Click the [Import] button to go to the import screen. Here you can also find a link to download a template for the question import (for more information see next page).

- Select the file to import and click [Import]. A validation of the file is displayed; click the [Proceed] to fully import the questions.

Creating Excel sheet templates:

1. From the Tender checklist page, click the Manage Qualification Questionnaire link. The Prepare qualification questionnaire page is displayed.
2. Click the [Import] button to go to the import screen. The Import question page is displayed.

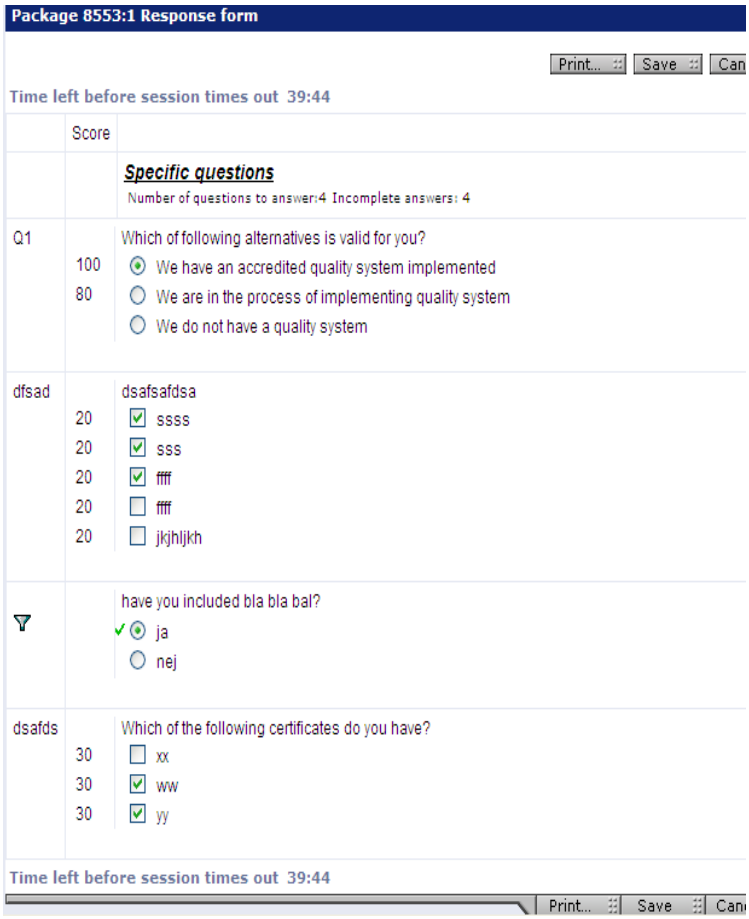
3. Click on one of the Download import format links. The empty import format just contains the correct settings and columns. The other one also contains question examples.



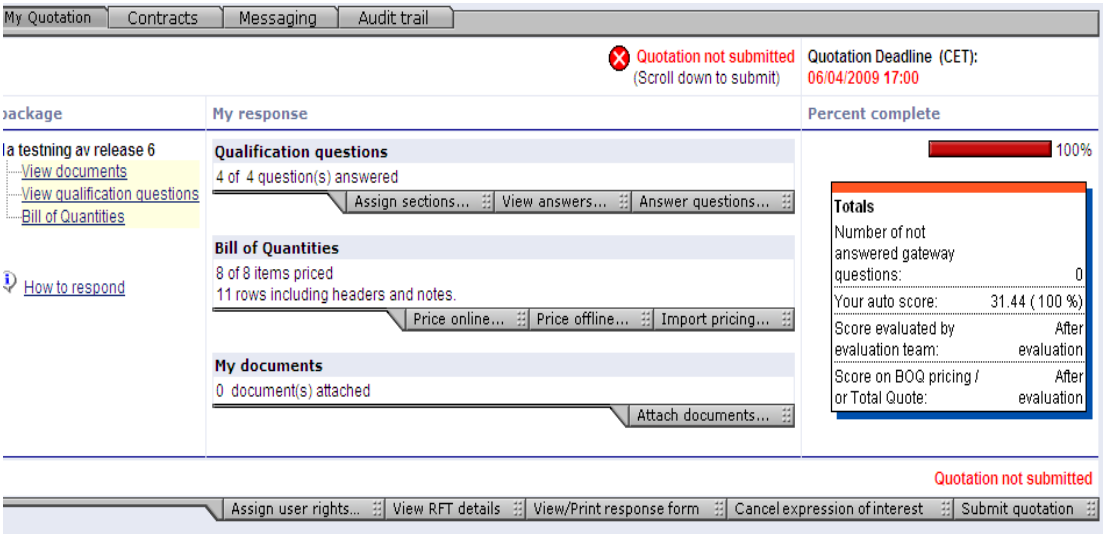
4. For more information about how to work with the excel sheet see the PowerPoint document **QQ template Instruction.ppt** that can be downloaded from the homepage.

The supplier view of your questions:

The supplier will see what scores/values you have determined for certain questions, see example of the supplier screens below to show how your autoscoring will affect the supplier in answering:



(Supplier screen of autoscores 1 or 2)



(Supplier screen of autoscores 2 of 2)

Evaluate answers:

The result of autoscoring is seen both in qualification view, evaluation (Analytics Engine) and on the page where you awards supplier of the contract. See below the screens to show result. You will have both score and ranking and this score and

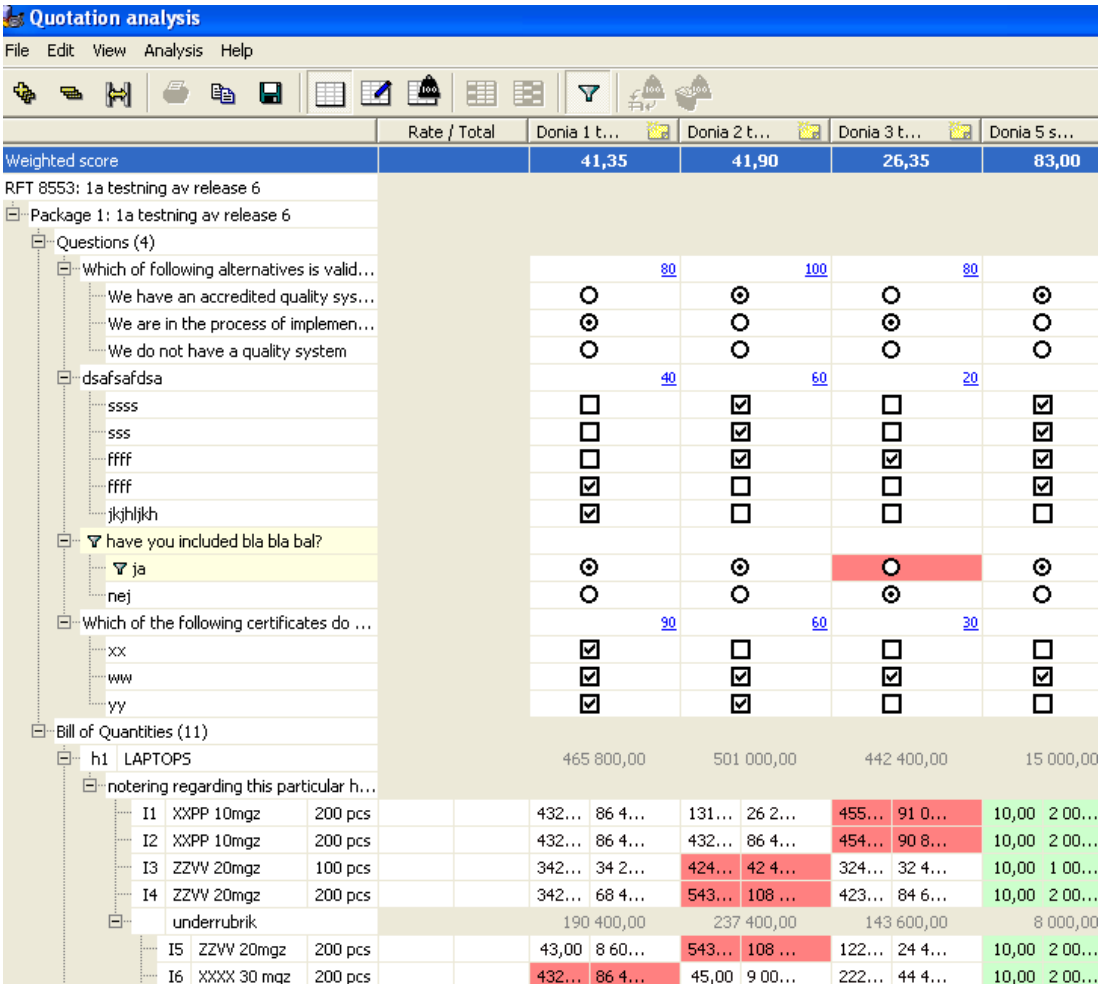
ranking will be determined by the system on the parameters autoscore decided and best price if such exist.

8553:1 - 1a testning av release 6		
	Donia 1 testcompanysupplier	Donia 2 testcompany
Rank and scores	rank: 3 score: 41.35	rank: 2 score: 41.9
Package specific questions		
Q1 - Which of following alternatives is valid for you?	○ We have an accredited quality system implemented ◉ **We are in the process of implementing quality system** ○ We do not have a quality system	◉ **We have an accredited quality** ○ We are in the process of impleme ○ We do not have a quality system
dfsad - dsafsafdsa	☐ ssss ☐ sss ☐ ffff ☑ **ffff** ☑ **jkjhljkh**	☑ **ssss** ☑ **sss** ☑ **ffff** ☐ ffff ☐ jkjhljkh
- have you included bla bla bal?	✓ ◉ **ja** ○ nej	✓ ◉ **ja** ○ nej
dsafds - Which of the following certificates do you have?	☑ **xx** ☑ **ww** ☑ **yy**	☐ xx ☑ **ww** ☑ **yy**
Documents		

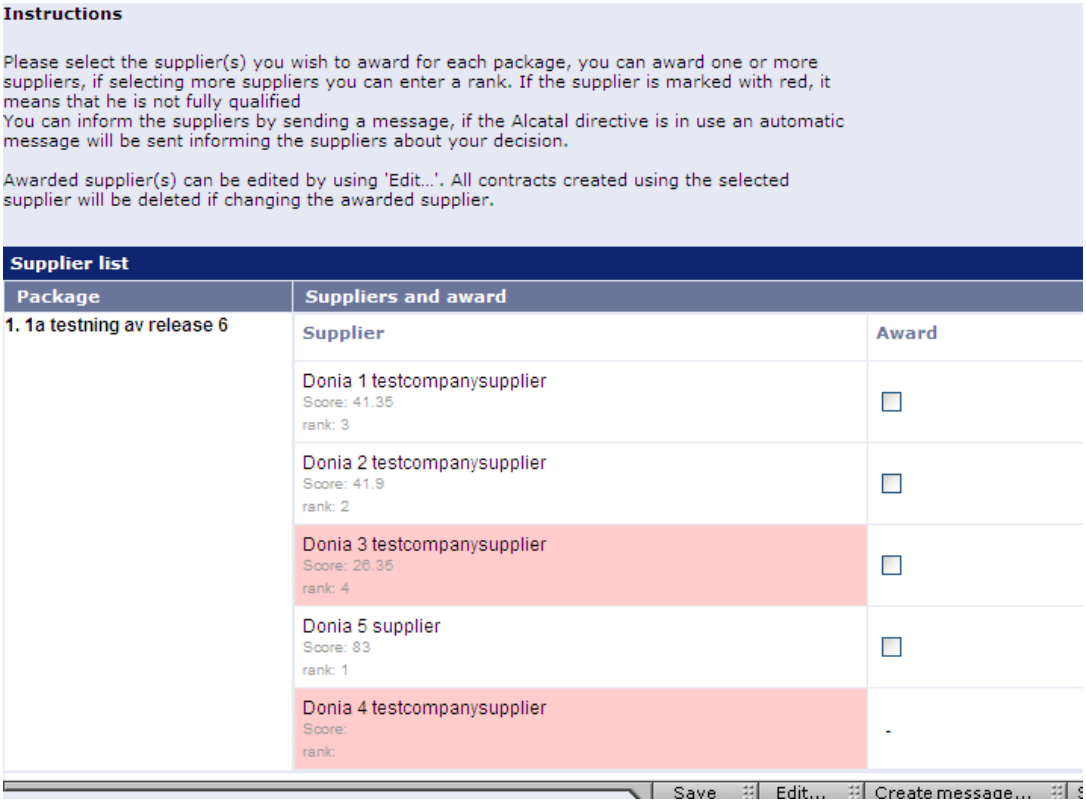
(The qualification view of autoscores and ranking)

Value Added questions is a separate evaluation model and a feature enabled upon request.

If you decide to work according to value added model your previous evaluation model will not work. The quotation of the supplier will decrease automatically if supplier has answered to this particular question the question alternatives gives you the possibility to put different value on different answer.



(The analytics engine view of autoscores and ranking)



(the award supplier view of autoscores and ranking)

Prepare documents:

This is a task to be performed outside of CTM, any documents that should be part of the Tender should be prepared prior uploading when completed just click the red ticker to set it completed.

Adding documents:

In addition to documents attached to specific bill items, documents can be attached to an entire Lot. Each Lot has a separate document folder where files and folders can be created (see 9.4 Document Folders for more information).

The documents can be uploaded into two main folders, one for documents that is sent to suppliers, such as specifications, drawings etc. The other folder is the internal documents, i.e. documents that will not be visible to suppliers, they are only internal for the buyer on this Tender, could be documents of tender strategy or similar.

Documents can be added to a Lot in the following two ways:

Upload document from your PC:

- Click on the [Upload files] button.
- A window displays all files and folders on your PC.

- Select the required file by clicking the checkbox to the left of the file name then click the [Upload] button.

- The documents are uploaded:

- The uploaded documents are displayed in the Lot document folder.

Add documents from your personal/ company/ "Project" document folder:

- Click on the [Add from shared folder] button.

- A window displays all files and folders within your "Project" document folder. You can change to your personal/ company document folder in the drop-down box.

- Select the file or folder you want to add and click the [Add selected document] or [Add selected folder] button. Any changes within the linked folder or document will be recognized also within the Lot such as deletes of documents, additions or new documents and revisions of versions.

- The selected file or folder is displayed in the Lot document folder.

Adding documents for compliance:

If desired, suppliers can be requested to confirm compliance with the specifications, e.g. documents included in the Lot information

1. To request confirmation of compliance, click on the link by the compliance confirmation section

2. Click the [Add document] button by the Document compliancy section to add a document that you want suppliers to confirm compliance with. The document has to be uploaded within the Tender to be able to select.

3. Select a document in the document list by clicking the checkbox to the left of the document then click on [Save].

4. The document compliance list is displayed. The document is added to the compliance documents list.

5. If all documents have been added, click on the [Done] button

Creating invitation letter:

The invitation letter is shown to the supplier when viewing the Tender online. You can write any information about the Tender and also use a pre-defined template to create the invitation letter. Note that the invitation letter is the first thing a supplier views for an Tender (except any published form to national or EU-sites) and the description here should be short and concise, with small description of you as a buyer and information about the Tender

1. To create an invitation letter, click the link next to the invitation letter section. A blank invitation letter is shown.
2. Enter any text within the invitation letter. You can also use variables to add, for example the name of the Tender from the application instead of filling in the name yourself. If the company administrator has created any templates, click the [Load template] button to fetch from archive. When finished with the letter click [Save] and [Done] to go back to checklist

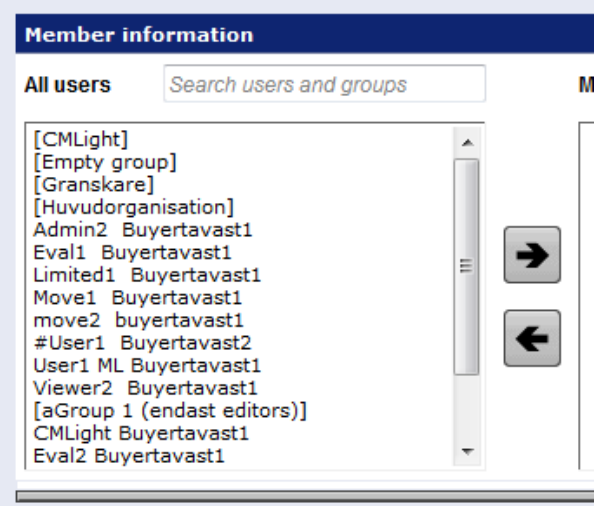
Setting weights:

Each of the sections added to the Tender for the supplier to answer can be assigned weights when evaluating and scoring the responses. The total score will then apply the weights set for each of the individual items.

1. To start setting the weights, click the link next to the Set weights section within the checklist. The analytical engine opens. **NB!** This option is only supported if using Internet Explorer as a web browser
2. Click on the weights icon for the weights view to be visible. Expand all the items to show the pre-filled weights
3. Enter the weights for each of the sections; the weights are entered as a percentage of the total. Weights should be set as 100 or 200% total maximum in order to divide per lot created.
4. When finished, click save and close the Analytical engine to go back to the checklist.

Select opening committee:

Select which persons should open the tender box after the deadline. Note that you MUST do this selection BEFORE Publishing (if this tender is to be published) and before the deadline! This only has to be made IF it has been decided that for the particular procedure that you are using a tender box has to be opened. You can however at any stage change the selected persons of opening committee if needed. If you yourself want to bee one of the openers of your own tender you must remember to select yourself and move over to the right hand side box..
If you have many users you can search by first name or last name in the top field

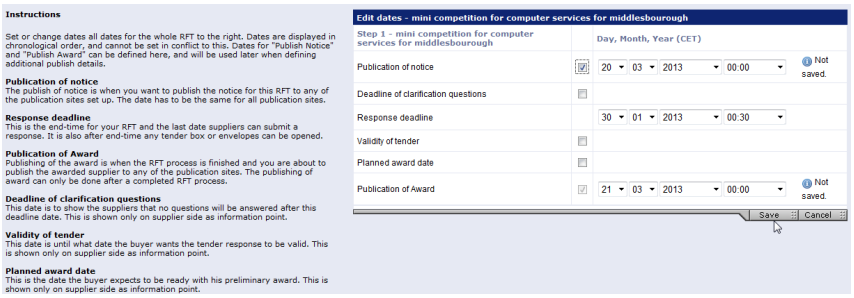


Publish/Amend:

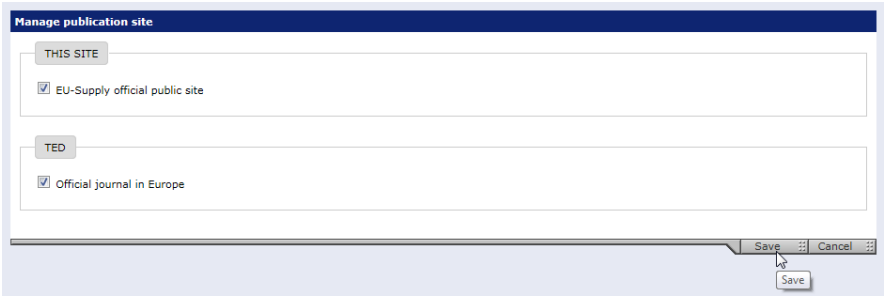
The Tender can be published and thereby made public. This means that it will be possible for suppliers to search through public Tenders and choose to take part in the tendering process. Publication can be made to different target sites. Currently OJEU, BOAMP, Doffin,TenderNed and Udbudsvagden are supported as well as the EU-Supply public (external) site.

Prior starting to publish following points must have been completed:

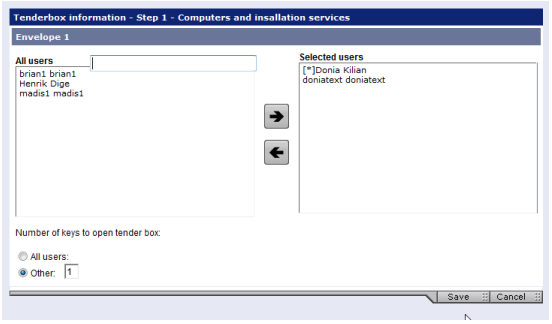
- Publish date have to have been set and saved in the section of dates within the check-list.



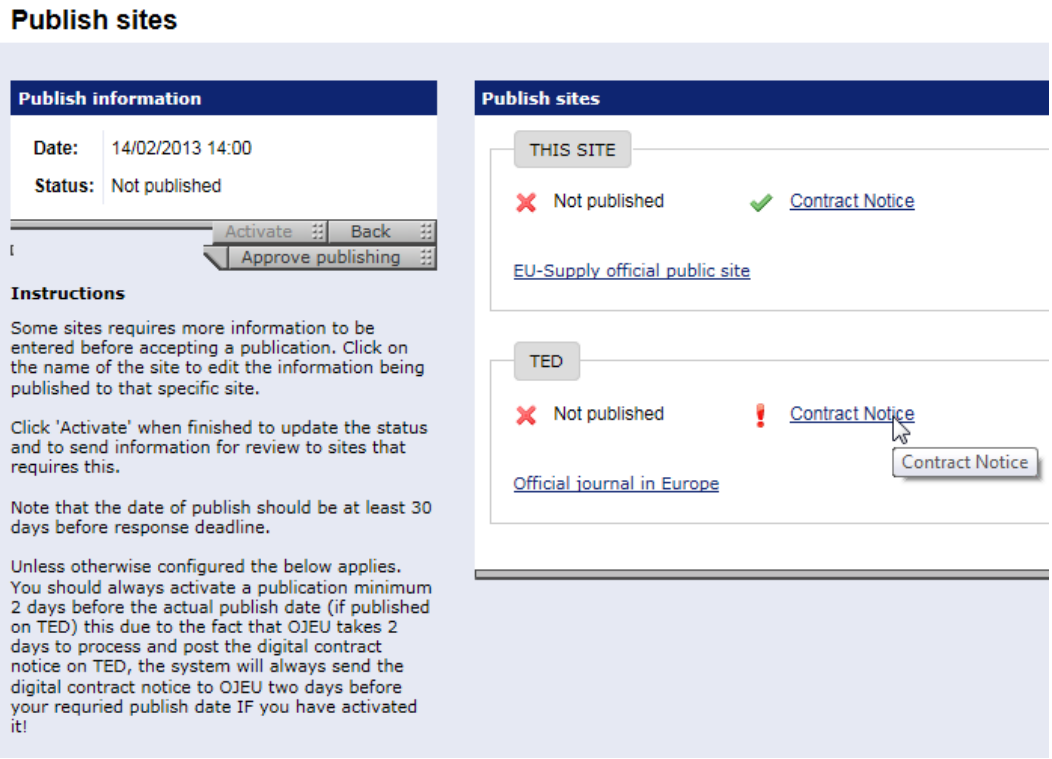
- Publication sites must have been determined and saved in the Publication section within the checklist



- Opening committee must be defined within the opening committee section of the checklist



1. To publish the Tender, click the Publish link and the Publish sites screen will show.



Click on the contract notice link to select which notice you wish to fill in and send. Fill in the official form and save.

2. The Tender must now be activated for publication and this is done by clicking the [Activate] button. Tender is now activated and will be published. (If you have the approval module switched on you will have to seek approval first before it will be possible to click on Activate.

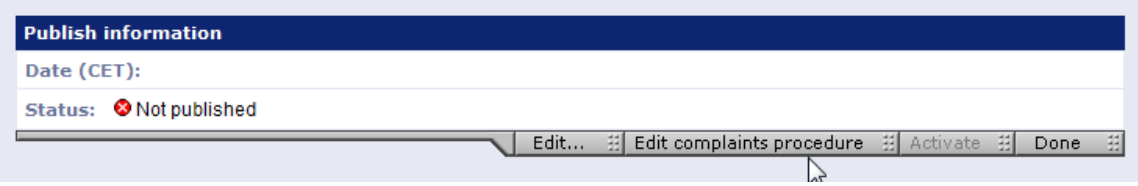
3. To deactivate a Tender, e.g. if some changes need to be made, click the [Deactivate] button. The Tender will then not be published. The deactivation can only be done if only publishing to the Eu-supply external web-site, for the other sites an email or direct publication is made to the different country publications sites and cannot be with-drawl.

4. You can also send amendment through the same screen. The Amendmet button/form will only be available if you have already sent and published the form/tender.

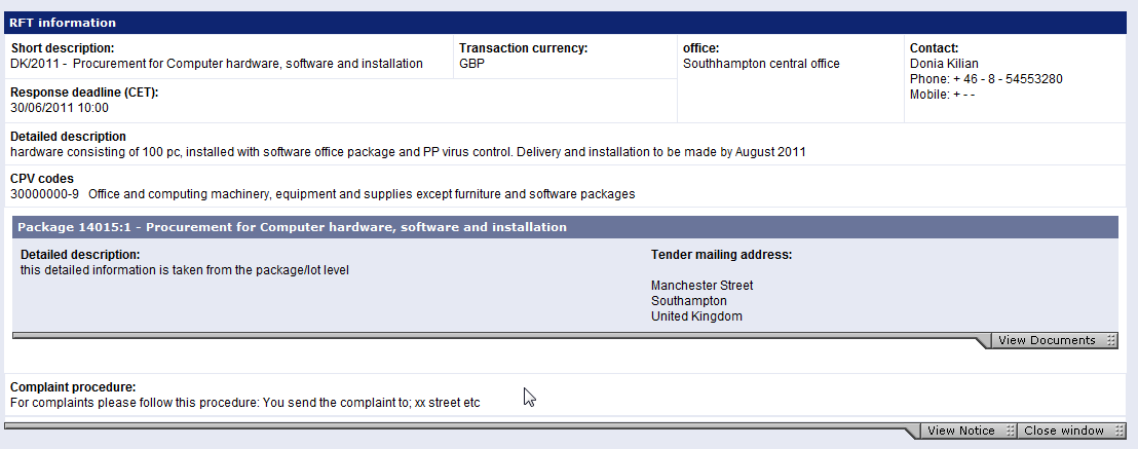
Publishing an Tender to the eu-supply local site also enables you to mark some documents uploaded as downloadable by supplier prior they log in and accept the public invitation. It could be documents with more description which will affect the supplier decision about participation in the Tender.
To mark documents as public, you'll need to go to the document folder and use the [Public display]

Complaints procedure

At the publishing link in checklist you can determine the complaints procedure that will be shown in the web pages of the tender. Click on Edit complaints procedure, select to use default procedure or enter new appropriate text in the text field and save.



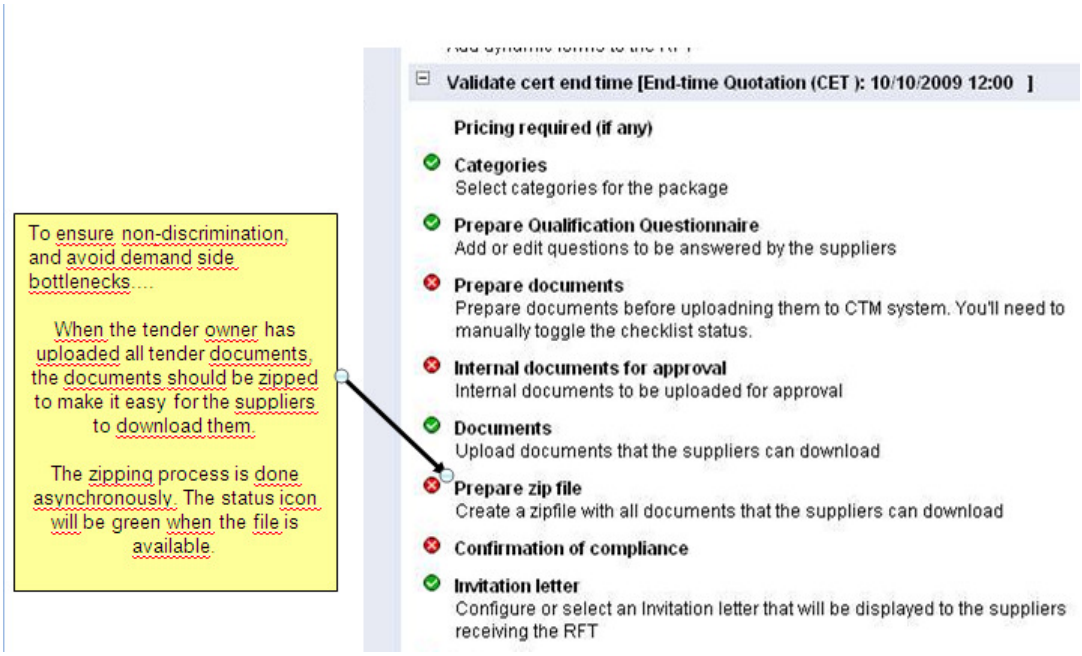
The complaints procedure is shown on the web page showing the tender. It does not show on the OJEU form it is the procurement officers that have to assure that the same complaints procedure is hown both on OJEU forms and on this web page. Alternatively ignore filling in any complaints procedure



Prepare zip file for the suppliers:

The owner of the tender is responsible for initiating zipping of the tender documents. When all documents have been downloaded, the owner uses the zip option in the checklist to prepare the zip file. If the zip file is not generated by the tender owner, the supplier can still download the tender documents individually.

The benefit for the suppliers is that the zip file will already be prepared so the documents are available for downloading without the supplier having to initiate the zipping process.



Suppliers:

Suppliers can be manually added to the Tender to later be invited. To access the supplier database click on the Search link. See section 5.1.1 Add suppliers. This option is only available if no publication is made.

Send invitations:

When suppliers are added they can be selected to receive an invitation to tender. To send an invitation, click on the Invite link. See section 5.1.2 Invite supplier.

Evaluation

To analyse the suppliers that have submitted responses there is the evaluation facility. A link to the evaluations is available in the checklist, click on the Edit link. See section 5.2 Analyse Responses.

4.1.4 Multiple lots within a Tender

You can, if desired create multiple Lots within the same Tender. This enables you to split a bigger Lot into multiple Lots to receive and compare prices both from suppliers that can deliver all Lots and suppliers that can deliver single Lots.

To create an additional Lot:

1. From the Tender checklist page, click the [Add Lot] button at the bottom. The create Lot screen is displayed

2. Enter the information about the new Lot and click [Save]

3. BoQ, questions and documents can now be added to the new Lot from the checklist

Copy an existing Lot

A whole Lot including all BoQ, documents, questions set up on the original Lot can be copied to be an additional Lot within the Tender.

1. From the Tender checklist page, click the Manage Lots link at the top of the checklist.

2. Click the [Copy] button to copy the Lot selected, when copying all data from the original Lot will be copied, such as documents, settings and qualification questions.

Section 5: Manage Request for Tender phase

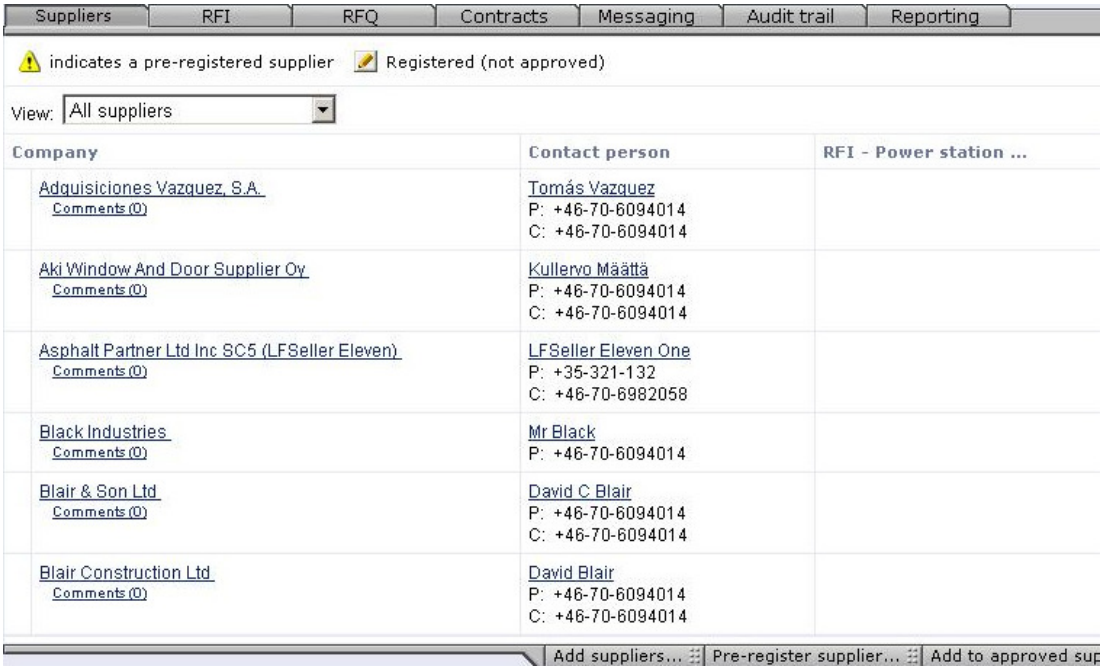
Here the activities for a phase of type Tender are described. The management of an Tender can be split into the following major steps:

- Set up the Tender (described in previous sections)
- Issue the Tender
- Analyse and evaluate responses
- Select the preferred supplier, or short-list for a coming phase

In addition there are tools available to support the process. These are described under “Process Tools” below.

5.1 Issue the Tender

On the supplier tab of the Tender main page you manage the suppliers involved through out the process.



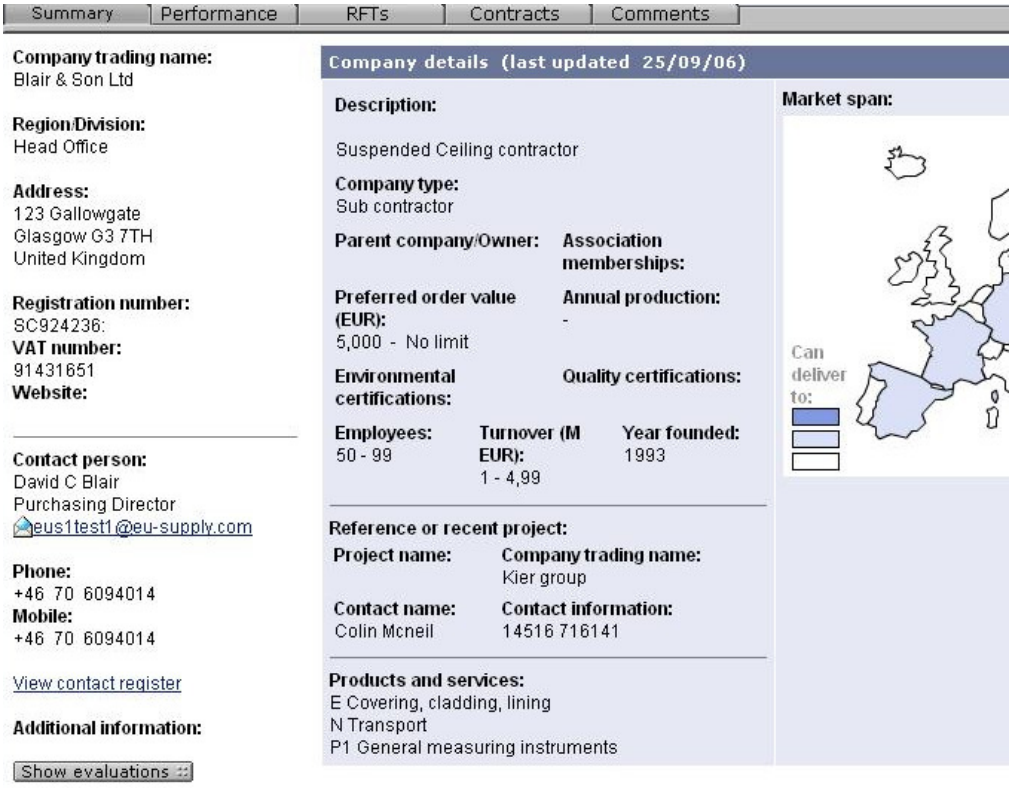
From the beginning the list is empty and suppliers need either to be added from the supplier database or to answer a public invitation. After invitation suppliers can start working on their response. Additional suppliers can be involved at any time until End Time Quotation. Suppliers can also be removed or “locked” during the process.

If a supplier is not registered in the system you can still run the process and "pre-register" them. They will then go through the registration process as a part of answering their first Tender.

5.1.1 Add suppliers

Suppliers are added to a Tender from the supplier database. Each supplier should have an updated profile including the following information:

- A summary tab with general company information.
- A Performance tab showing KPIs related to responding to Tenders such as average response time in days, % won Tenders etc.
- An Tender tab with links to previous Tenders the supplier has participated in.
- A Contract performance tab showing contract history KPIs such as delays, variations etc.
- A comments tab enabling you to make comments about this supplier's performance. Can be shared or personal.



There are five main search capabilities:

- **Quick search -** if you know what suppliers you want to involve. Here you can search by name, address etc.

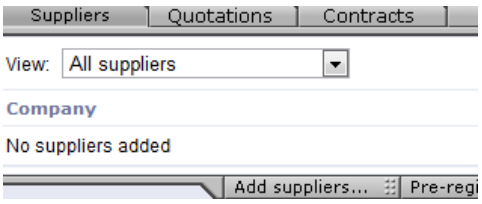
- **Tender search –** if you want to invite one or more suppliers invited to previous Tenders created within your company.

- **Category search -** if you want to find additional new suppliers. Here you search using the categorisation system of suppliers.

- **Approved suppliers -** if you want to save and re-use own favourite lists of suppliers.

- **TransQ supplier search – if you belong to utility sector and have integration with this system**

To reach the supplier database, click on the [Add suppliers…] button on the { Suppliers } tab.



Quick search:

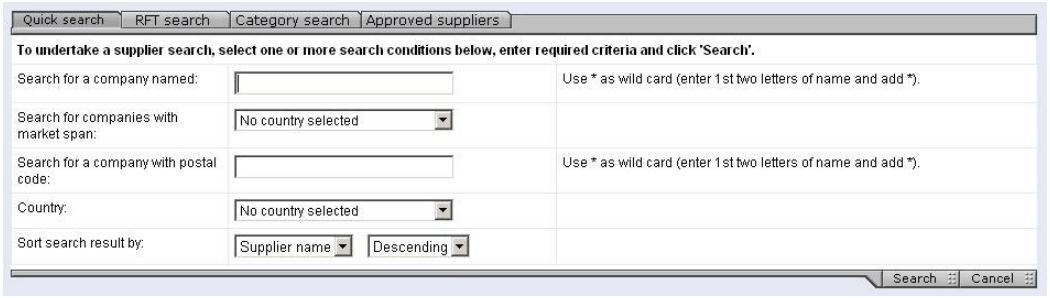
You can search by the following:

- **Search for a company named –** search companies by name.

- **Search for companies with market span –** search for a supplier selling to a specific country.

- ***Search for a company with postal code –*** search using part of the postal code.

- ***Country –*** search for a supplier located in a specific country.



To search using Quick Search:

1. Select the required search parameters.

2. Click on the [Search] button. The result is presented in a list presenting twenty companies at a time.

3. To view the profile of a company, click on the company name.

4. To add a company to the Tender, select the company by clicking the checkbox to the left of the company and click on the [Add] button. The supplier is added to the list.

Tender search:

In the Tender search you can search within the previous Tenders you have created on the system

To search using Tender Search:

1. Enter the name of the Tender you are searching for and click [Search]. Search result is displayed with the Tenders

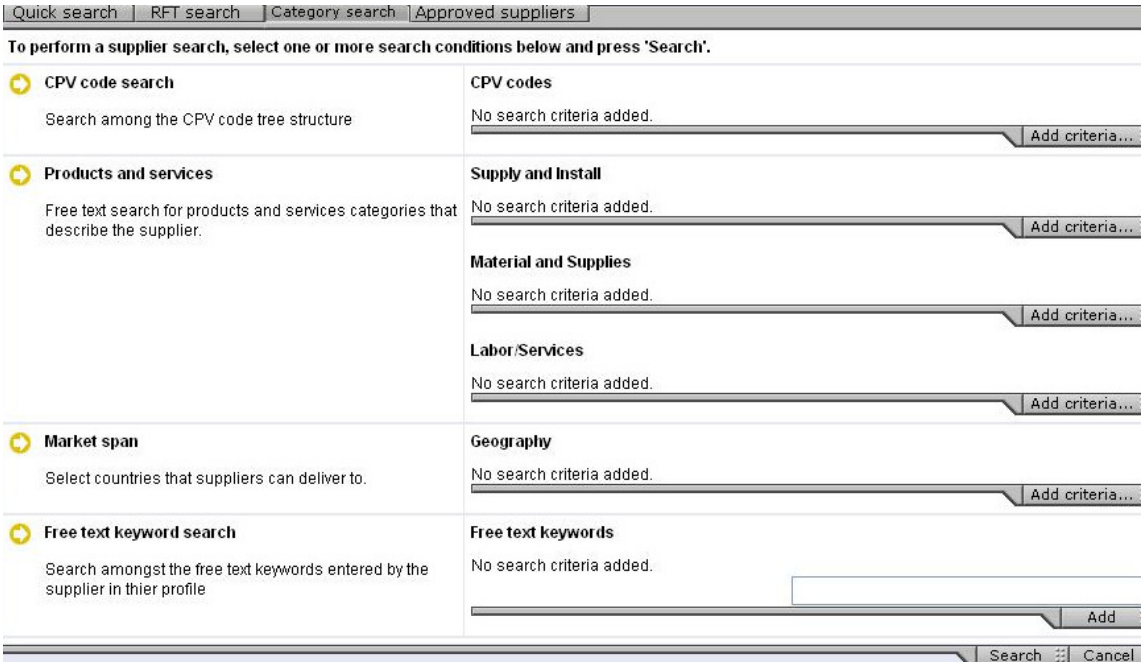
2. Alternatively, enter the postal code (zip code) for the area that the company should be in and click [Search].

3. Click on the Tender to add suppliers from, a pop-up window is displayed with the suppliers in the Tender

4. Select the suppliers to add and click [Add]. The selected suppliers are added to the Tender

Category search:

In the category search you can search using the categorisation structure of the supplier database. You can use product/service categories combined with geographical areas when creating the search condition. There is also a possibility to search using the free text keywords that the suppliers enter into their profiles.
To find suppliers using the category search it is required that suppliers has updated their supplier profile.



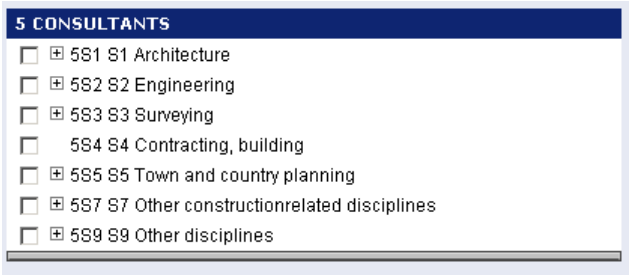
To add a supplier to the Tender using Category search:
Depending on your settings and operator you will have different choices of categories to choose from.

1. Click on the [Add suppliers] button on the supplier tab.

2. Click on the { Category search } tab.

3. To specify the product/services search criteria, click on the [Add criteria…] button for each category type.

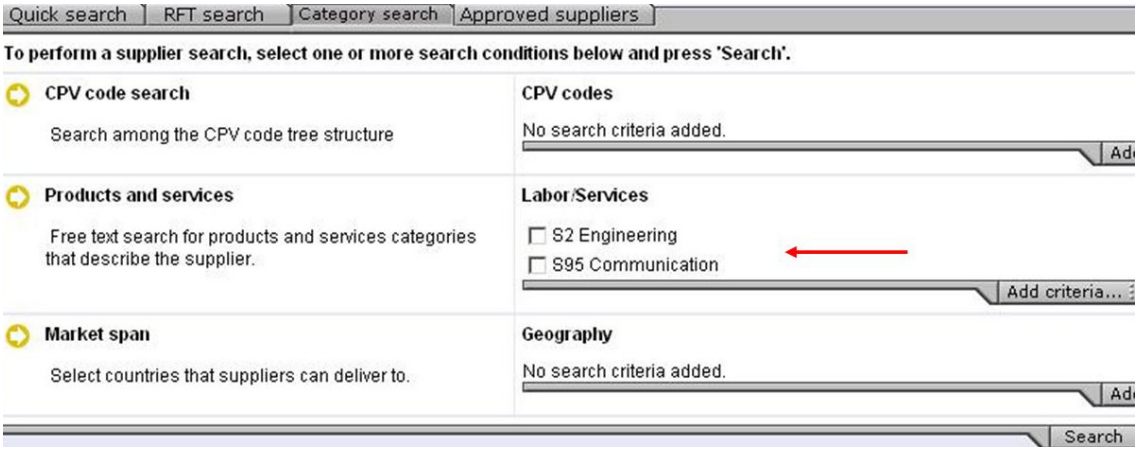
4. The selected categorisation tree is displayed.



5. Select the desired categories by clicking in the checkbox to the left of the item.

6. Click on the [Save] button.

7. The search condition is updated with the selected categories.



8. To specify the market span search criteria, click on the [Add criteria…] button to search the Geography categorisation.

9. The geographical areas are displayed.

10. Select the desired categories.

11. Click on the [Save] button.

12. The search condition is updated with the selected geography.

13. Keywords are added by typing a keyword and the pressing the [Add] button, then typing the next keyword and pressing [Add] and so on.

14. Keywords can be deleted by checking the box in front of them and then clicking the [Delete] button.

15. Click on the [Search] button.

16. Select one or more of the suppliers.

17. Click on the [Add] button to add the suppliers to the Tender.

Approved/qualified suppliers:

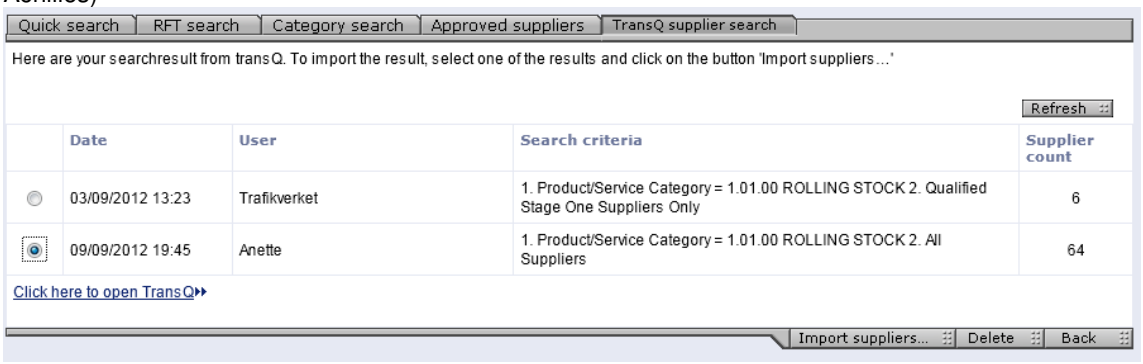
You are able to store your qualified suppliers in separate lists for easy retrieval. Lists can either be private or shared with your colleagues.

To add a supplier to the tender using approved folders:

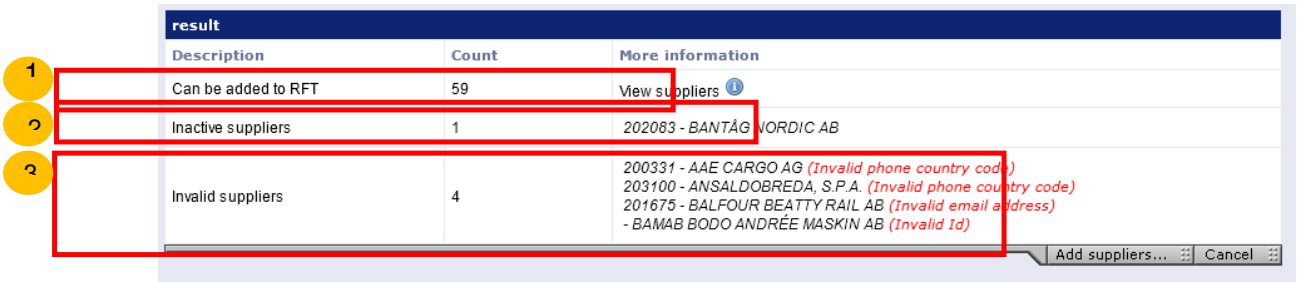
1. Click on the [Add suppliers…] button on the supplier tab.
2. Click on the { Approved suppliers } tab.
3. Select Personal suppliers or Company suppliers.
4. Select the supplier list you are interested in.
5. Select the suppliers you want to include and click on the [Add to Tender] button. Suppliers are added to the Tender

TransQ supplier search

Search and add suppliers from third party system TransQ/Sellicha (developed by Achilles)



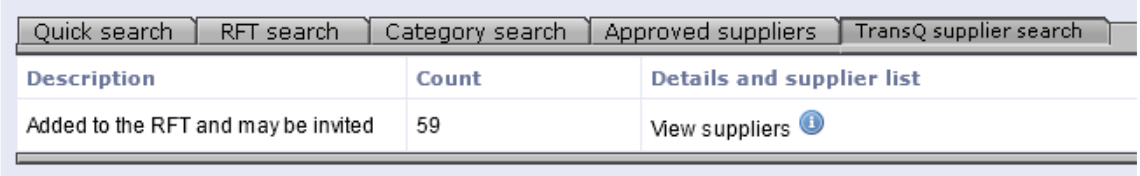
Selecting the search criteria from the TransQ search list is the same as previous.



After selecting the file of suppliers to import, the result of the import is shown, note, no suppliers imported or added yet.

1. Suppliers which can be added to the tender in CTM, click on the Information icon to see list of supplier
2. Suppliers which, for some reason, are inactive in CTM. Please contact support for further details. Inactive supplier cannot be added to a tender in CTM
3. Suppliers which cannot be imported, due to invalid data from TransQ/Sellicha. You would need to contact the supplier and ask them to update their profile in TransQ/Sellicha

By clicking 'Add suppliers' you will add the suppliers in number 1 to the tender. After adding the suppliers, the search is removed from CTM and cannot be reused. You will have to create additional searches in TransQ/Sellicha



Suppliers added verification screen, click on the information icon to see the list of added suppliers.

5.1.2 Pre-register a missing supplier

If a supplier has not registered yet, you can still involve them in a Tender through pre-registering them. This is an alternative to calling them, then waiting for them to be registered and approved and thereby made available. Pre-registering the supplier will make the registration easier for them and also from the start connect them to the Tender.

To pre-register a supplier company:

1. Click on the [Pre-register supplier…] button on the supplier tab.

2. Fill out the form with contact information of the supplier company and click on the [Save] button. Fields marked with (*) are mandatory.

3. The company is presented in the supplier list and can be managed as any other company i.e. invite them to participate in the tender. The company is marked with a ⚠ sign until fully registered. When the company is fully registered it can fill in a response and submit a quotation.

5.1.3 Invite supplier

Suppliers have to be invited separately for each of the phases in the Tender process. You can invite both fully registered suppliers and pre-registered suppliers.

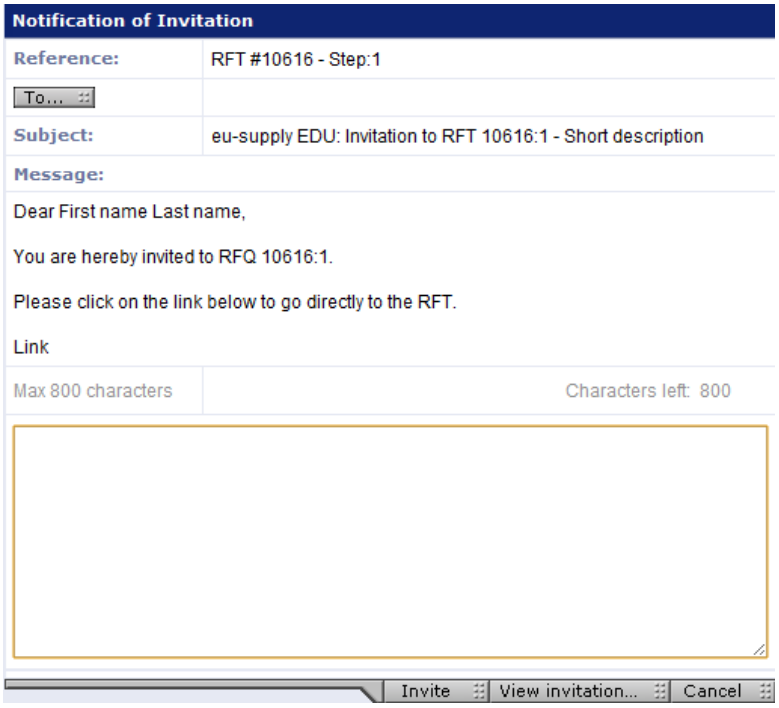
To invite a supplier:

1. Click on the quotations tab for desired phase/step.

2. Click on the [Invite suppliers…] button.

NOTE: If an approval flow is set up within your company approval may be requested prior to suppliers can be invited. Also, IF you have tender box usage you must have selected an opening committee in order to invite.

3. A pre-filled message template is displayed and your own text can be added to it. For information about changing the pre-defined message, please refer to the company administration guide.

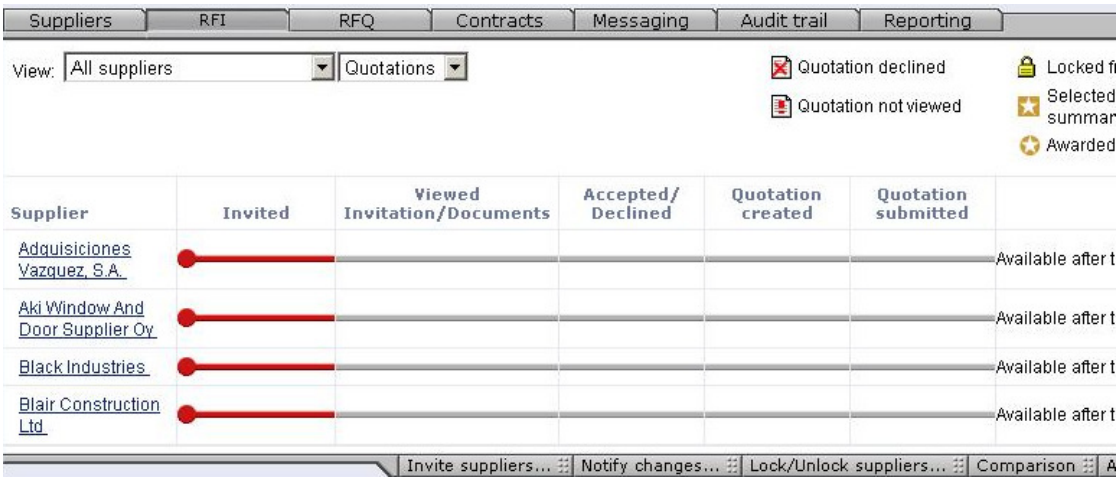


4. Click on the [To…] button to select recipients of the message.

5. Select the desired recipients by clicking the checkbox to the left of the entry and click on the [Select] button.

6. Add any complementary text and click on the [Invite] button to send the invitation message. (The message is sent through email or as a system message depending on the settings of the recipient.)

7. The status of the invited companies is updated to “invited” for the phase. Suppliers invited can now log in and start working on their response and send the quotation.



5.1.4 Remove and Lock/Unlock

There are two ways to exclude a supplier from participation in a Tender. This can be done throughout the process which enables you to limit the number of participators after negotiations.

- *Remove*
  This removes the supplier fully from the Tender. Remove can be done until you have sent an invitation and informed the supplier of the Tender. After invitation, only locking can be used.

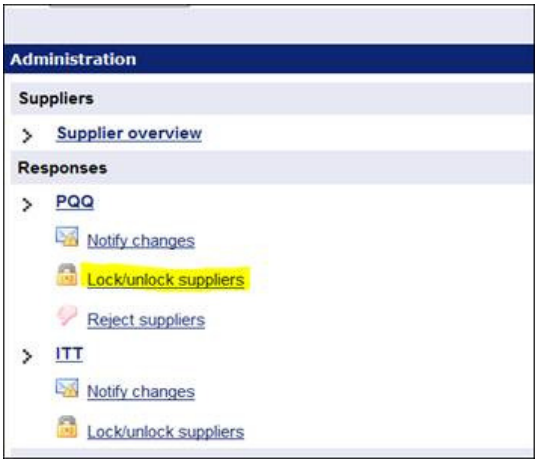
- *Lock/unlock*
  A supplier that is locked cannot create or edit their response. Through locking (and unlocking) suppliers you control which suppliers are active at what time in the process. At End time quotation all suppliers are locked by the system unless you have selected to accept late responses when creating the Tender.

  When selecting to unlock suppliers after end-time you can choose to open certain areas of the response for them to amend and change certain areas of their response, for example correcting obvious errors or within a negotiation.

  You can lock and unlock a supplier as many times as you want during the process. When a supplier is locked or unlocked, a system message notifies them.

To lock a supplier:

1. From the Administration page or Quotation tab, click on the [Lock/Unlock suppliers…] button.

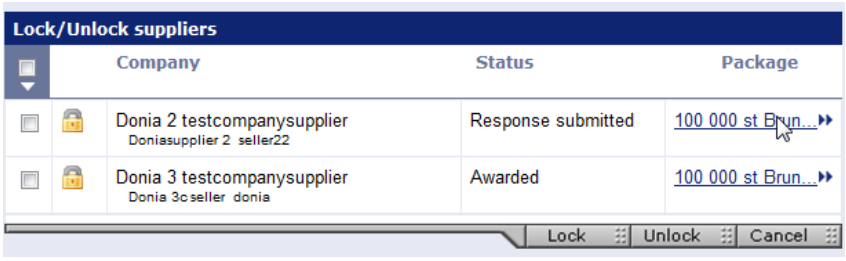


2. On the Lock/Unlock screen select the supplier to be locked then click on the [Lock] button, if this is after tender deadline all suppliers are locked, in case you wish to *completely* unlock any supplier click as below, be aware that the supplier then has access to his entire tender and can amend accordingly (prices, documents, QQ responses or whatever functions you have set on this tender)

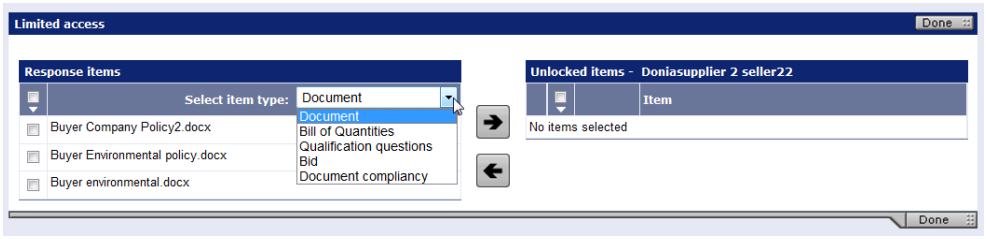
To *partially* unlock a supplier:

1. From the Quotations screen, click on the [Lock/Unlock suppliers…] button.

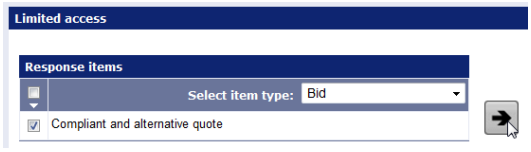
2. Click the link of the Lot name in the right most column.



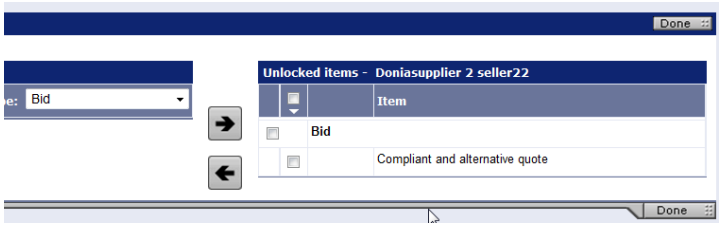
3. Within the left hand side, select the area to unlock in the drop-down. A list of items is displayed. You can for example allow the supplier to ONLY add documents or ONLY respond again to one particular question etc.



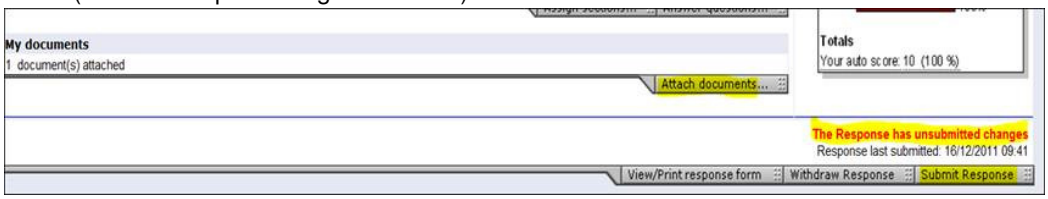
4. Select the items to unlock and use the arrows in the middle to move them to the unlocked area.



Items moved to the unlocked area will be open for the selected supplier to change until you manually lock the specific item again.



Make sure you inform the supplier of how long and what part is unlocked and that the supplier needs to submitt the changes in order for you to receive them. (in this example adding documents)



5.1.5 Publish the Tender notice

If you are in a public process and cannot search and invite suppliers within the system, you should publish the Tender for suppliers to find an answer.

Currently we support six "sites" for publishing a notice:

- **Eu-supply site or client site –** The local publishing to the eu-supply site and the client site. From this publish page the suppliers can go in directly and accept the public invitation and start working with their responses.

- **OJEU –** The official journal and publication place within the EU. All public tenders within the European Union must be published to OJEU, or TED/SIMAP as it also is called.

- **Doffin –** Norwegian official publication site for publication of tenders within Norway. If the tender is above EU threshold value it publication will be automatically sent to SIMAP for publication via Doffin.

- **BOAMP –** French publication site for all public tenders within France. The BOAMP has a connection to SIMAP and a publications made to BOAMP are automatically published to SIMAP as well.

- **Udbud.dk –** Danish publication site for all public tenders within Denmark. (previously Utbudsvagten)

- **TenderNed -** The publication process to TenderNed is basically the same as for any other national publication site in CTM, however, there is one big difference. TenderNed requires each contracting authority to be registered on TenderNed with a contracting authority id. The contracting authority id is required in order to publish from CTM to TenderNed. For questions on how to obtain the contracting authority id, please contact TenderNed.
  The contracting authority id can be set up in the company profile.

Depending on modules installed and country origin you may or may not see all publication sites.

To publish a Tender notice:

1. From the Tender checklist, click the Publish link next to the publish section. A list of pre-defined publish sites is displayed.

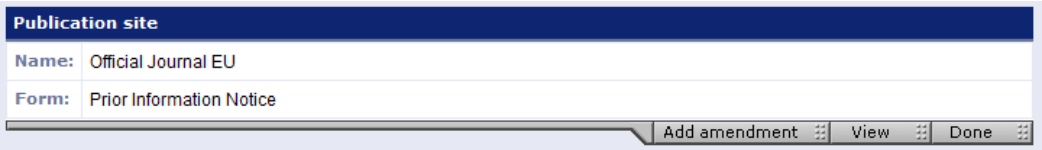
2. To add additional sites, click the [Edit…] button.

3. Set the publication date, same date for all publish sites, select the desired publish sites and click [Save].

4. If selecting OJEU, BOAMP, Doffin, Udbud.dk (previously Utbudsvagten)or TenderNed as publication site, you'll need to fill in a form prior to publishing the Tender. Click the [Edit…] button next to the publication site and fill in the forms. The forms are the same you are required to fill in at any of the publication sites. CTM will pre-fill some of the values from the system for you as a help. See no 7. for utbud.dk specifics

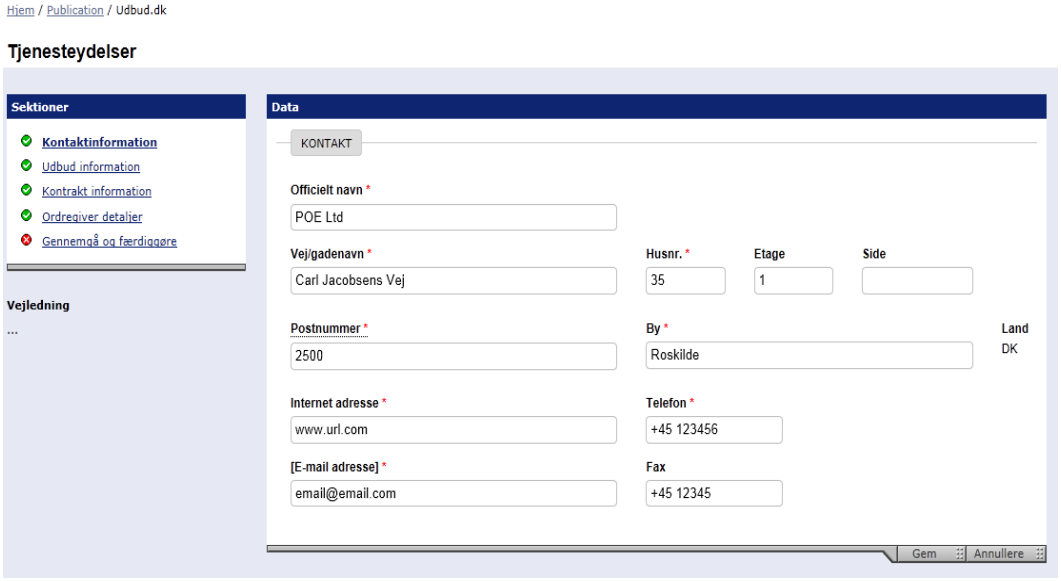
5. When finished with the forms, click the [Publish] button. The forms and publication notification will be sent and the Tender will be published on the set date and time.

6. To amend a publication go into the publish link and amend the publication by clicking on [Add amendment] fill in the amendment form and activate. (more information can be found in heading Amending the notice 5.4.3)



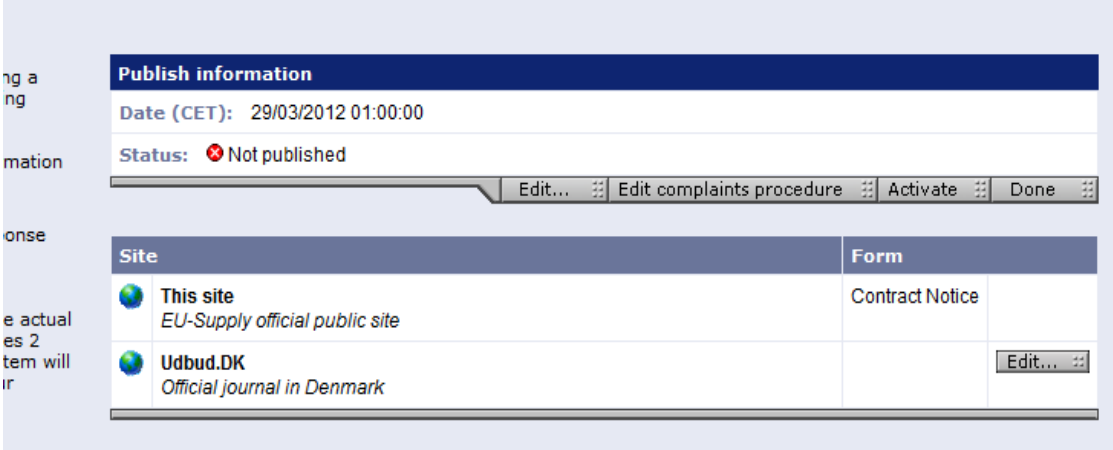
7. Utbud.dk

National Danish tenders within CTM can be published to the Udbud.dk portal.



Example of one section to fill in

The actual filling of a form is a bit different than for the current TED forms, the forms have been split into sections (see above image for an example) and each section can be filled and saved individually. Once the form is fully filled the complete form has to be reviewed and finalized, last point in the checklist on the left, after the finalisation the form can be published to udbud.dk.
The flow within the tender is the same for Udbud.dk as for TED, Udbud.dk is listed as an additional publication site and Activation is done at the same place.



The forms supported in version 6.9 of CTM are:

- Form 01 – Tjenesteydelser
- Form 02 - Bygge- og anlægsopgaver
- Form 03 – Varekøb
- Form 04 – Indkøbsplaner

For version 6.9 publishing of tenders are supported. The deletion, cancellation and updating of a publication is planned for later versions of CTM, and will currently be handled manually until they have been fully implemented.

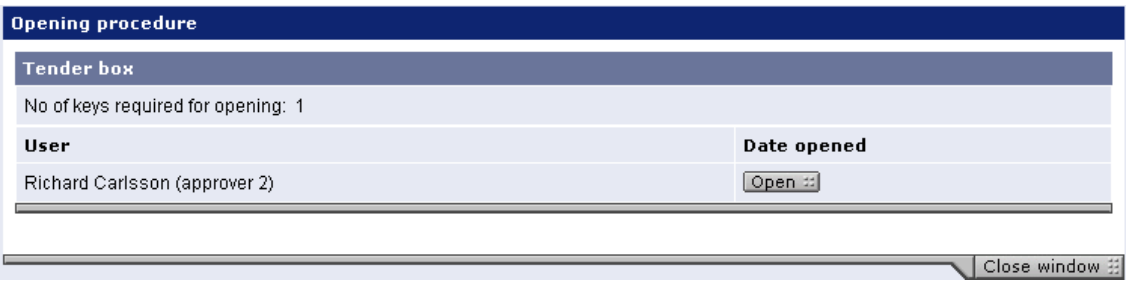
The new Udbud.dk is replacing the current Udbudsvagten and new publications after the 6.9 update have to be published to udbud.dk instead. There will still be the possibility to view any publications previously made to Udbudsvagten.

5.1.6 Opening proposals (optional)

The supplier responses can be locked for viewing until any tender box or envelopes have been opened. The tender box and envelopes are mainly used within the public procurement process to hide any responses prior end-time. The tender box and envelopes can be used individually or together.

To open the tender box:

1. Click on the [Opening procedure…] button from the quotations tab. A pop-up window is displayed with the users that are allowed to open the tender box.
2. The people selected to open the tender box at creation stage are displayed.

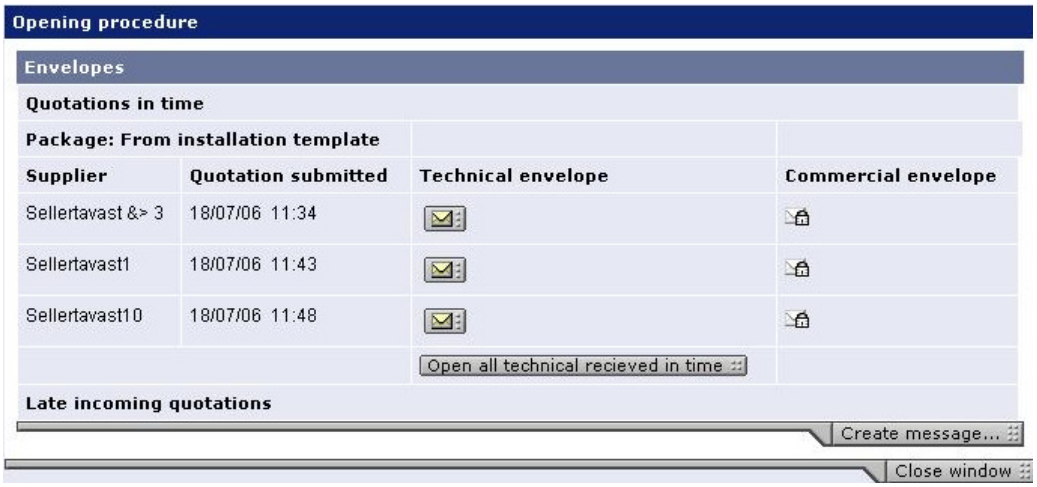


3. Click on the [Open] button for each of the users. The user is requested to verify him by filling in his user name and password to the site. If the current user is logged in, there will not be an extra verification step.

4. The tender box is opened and the quotation information is accessible.

To open double envelopes:

1. Click on the [Opening procedure…] button from the quotations tab



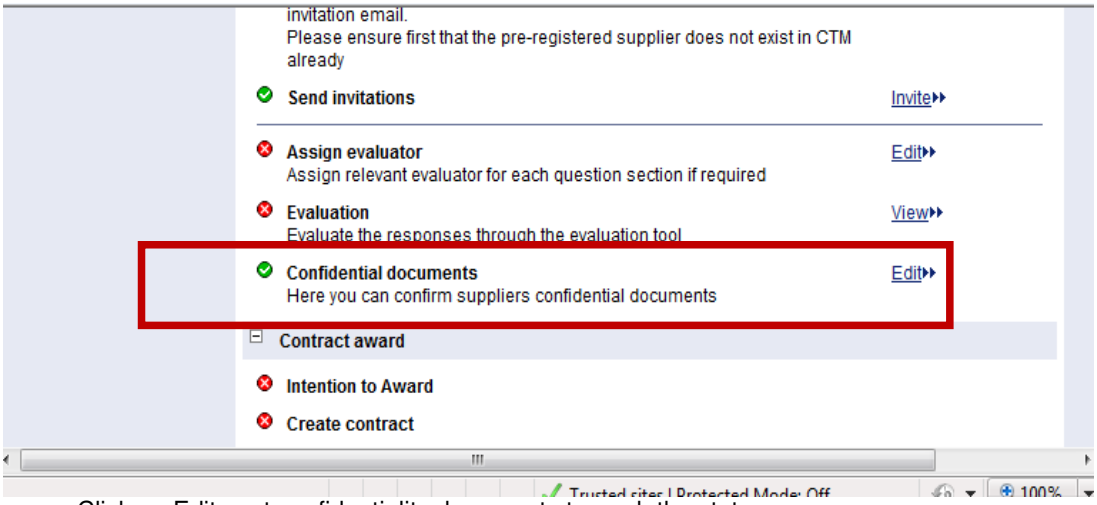
2. Click on the button for each of the envelopes to open them.

3. The first envelope is opened. After review of the technical information the second envelope may be opened. That is done in the same way. The second envelope can also be rejected, done by clicking the button. The rejection means that the buyer will not see the content of the second envelope and that the supplier did not comply with the requirements within the first envelope

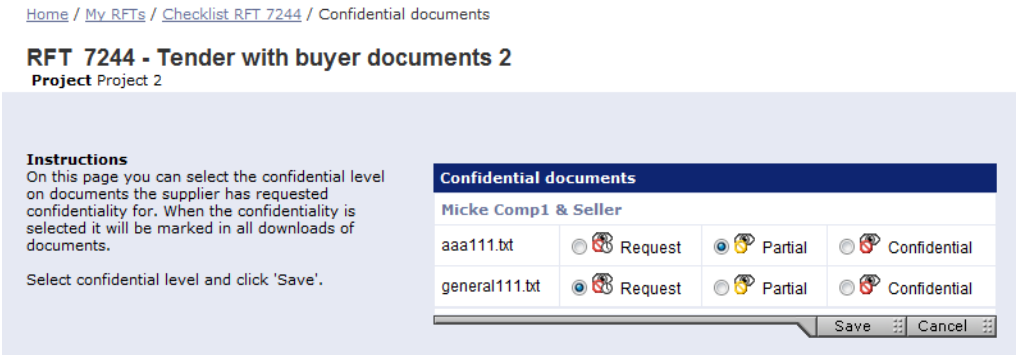
5.1.7 Confidential documents (separate setting)

This is to define if supplier response documents are confidential or not. The flow is that the supplier can request confidentiality, the procurement officer can then grant partial or entire confidentiality, in this point in the checklist.

After the contracting authority has opened any tender box he can from the checklist view the confidentiality requests and mark

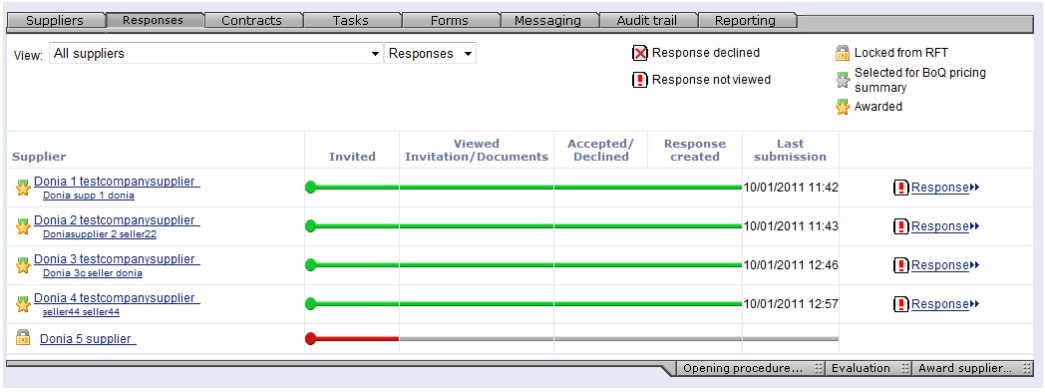


Click on Edit next confidentiality documents to mark the status.



5.2 Analyse responses

On the quotation tab for the step you can follow the progress of the suppliers involved and review their responses. Once opened you can see the last submission date/time on each tender respons.



The following can be reached from the Quotation tab:

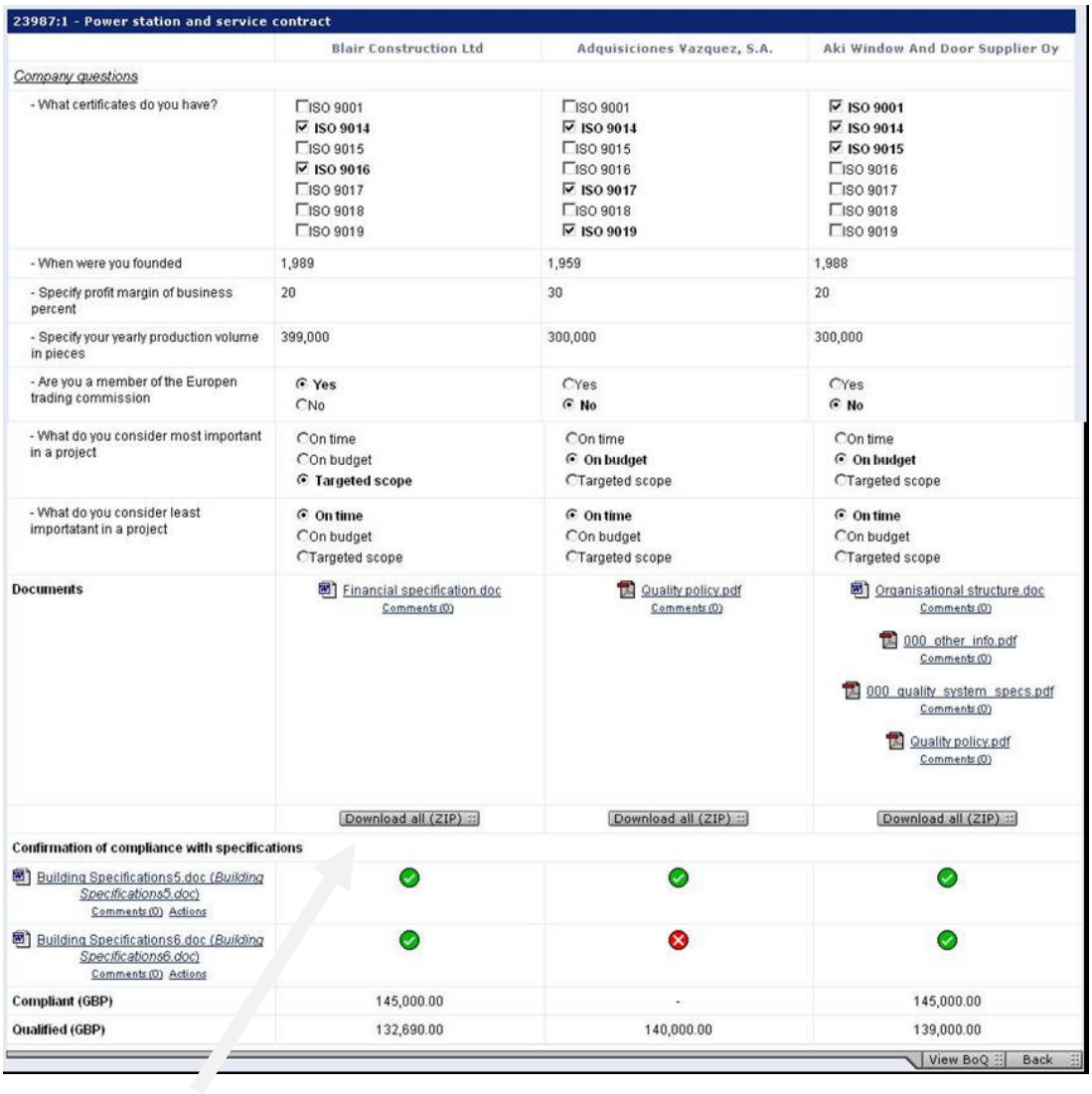
- **Quotation (1-by-1 presentation)**

By clicking on the Proposal link for a supplier you reach their quotation in a printer friendly version.

Details about pricing of BoQ items can be reached from here. Also any comments on documents can be displayed.

Qualification

By clicking the [Qualification] button you get to a presentation of all supplier responses side by side. The comparison includes all response information excluding the BoQ information and provides a quick first comparison view of the responses received.



23987:1 - Power station and service contract	Blair Construction Ltd	Adquisiciones Vazquez, S.A.	Aki Window And Door Supplier Oy
Company questions			
- What certificates do you have?	☐ISO 9001 ☑ **ISO 9014** ☐ISO 9015 ☑ **ISO 9016** ☐ISO 9017 ☐ISO 9018 ☐ISO 9019	☐ISO 9001 ☑ **ISO 9014** ☐ISO 9015 ☐ISO 9016 ☑ **ISO 9017** ☐ISO 9018 ☑ **ISO 9019**	☑ **ISO 9001** ☑ **ISO 9014** ☑ **ISO 9015** ☐ISO 9016 ☐ISO 9017 ☐ISO 9018 ☐ISO 9019
- When were you founded	1,989	1,959	1,988
- Specify profit margin of business percent	20	30	20
- Specify your yearly production volume in pieces	399,000	300,000	300,000
- Are you a member of the Europen trading commission	◉ **Yes** ○No	○Yes ◉ **No**	○Yes ◉ **No**
- What do you consider most important in a project	○On time ○On budget ◉ **Targeted scope**	○On time ◉ **On budget** ○Targeted scope	○On time ◉ **On budget** ○Targeted scope
- What do you consider least importatant in a project	◉ **On time** ○On budget ○Targeted scope	◉ **On time** ○On budget ○Targeted scope	◉ **On time** ○On budget ○Targeted scope
Documents	Financial specification.doc Comments (0)	Quality policy.pdf Comments (0)	Organisational structure.doc Comments (0) 000_other_info.pdf Comments (0) 000_quality_system_specs.pdf Comments (0) Quality policy.pdf Comments (0)
	Download all (ZIP)	Download all (ZIP)	Download all (ZIP)
Confirmation of compliance with specifications			
Building Specifications5.doc (*Building Specifications5.doc*) Comments (0) Actions	✓	✓	✓
Building Specifications6.doc (*Building Specifications6.doc*) Comments (0) Actions	✓	✗	✓
Compliant (GBP)	145,000.00	-	145,000.00
Qualified (GBP)	132,690.00	140,000.00	139,000.00

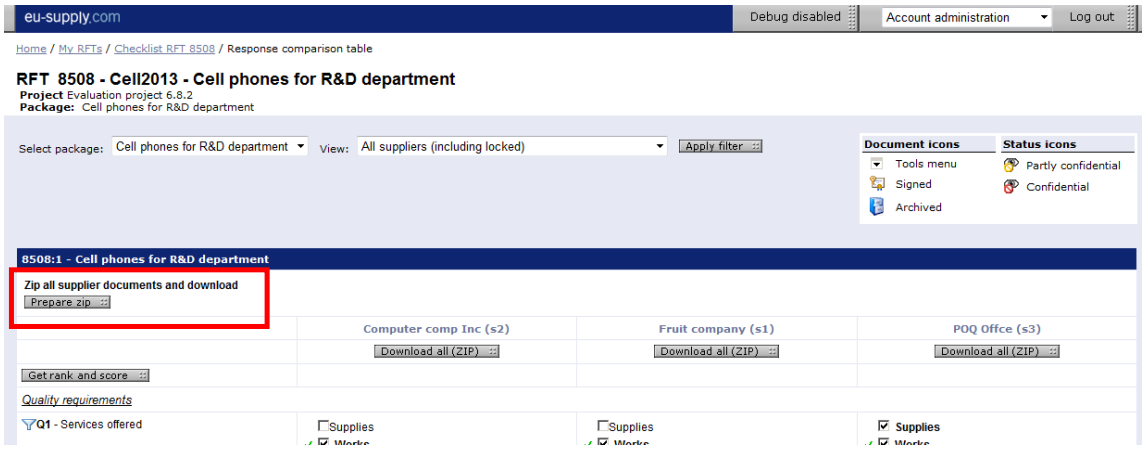
View BoQ | Back

[Download all (ZIP)...] button under each supplier will give you all the documents that the supplier has attached in his tender: documents from the documents folder, documents attached as part of an answer to a question in the system and finally also the documents that the supplier has sent as attachment in any message through the system.

You may also download all documents uploaded by all suppliers as one Zip File. There are two steps to the process.

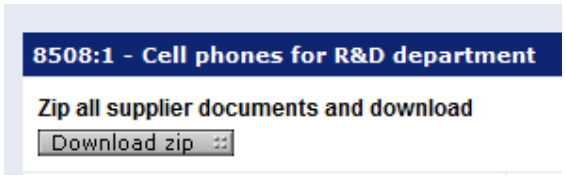
(i) Prepare a zip-file

(ii) Download.



Prepare zip file

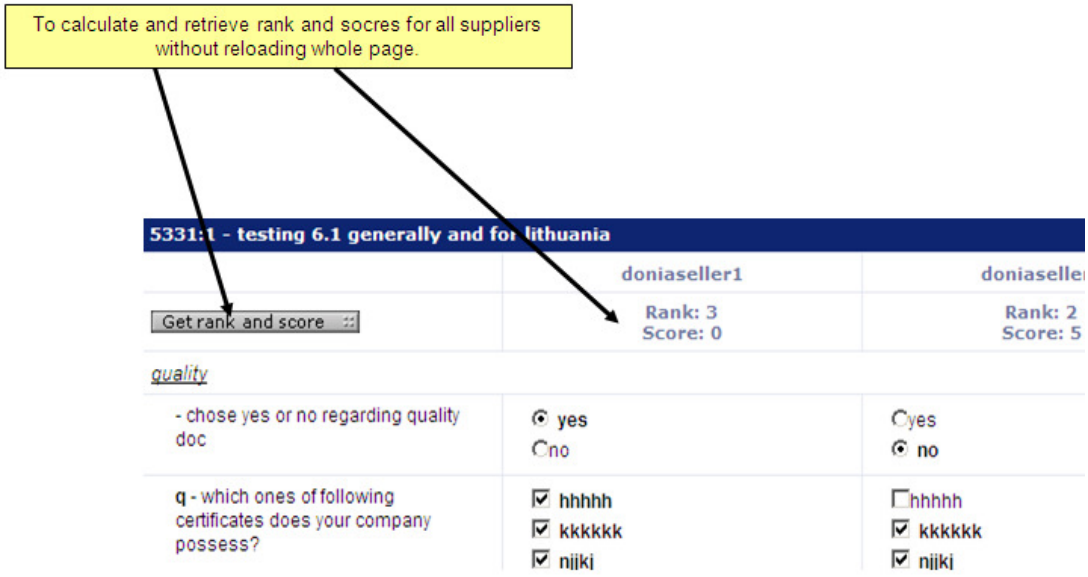
The prepare zip is there to pack all supplier documents to one downloadable zip-file.



Download

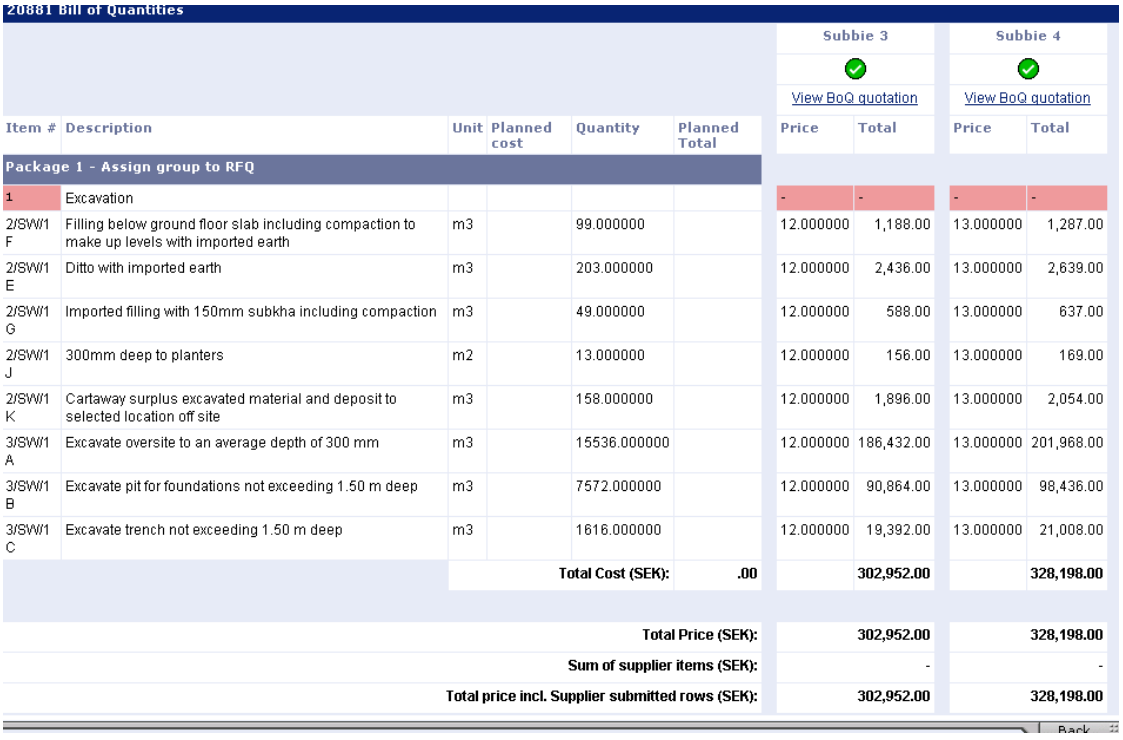
The zip-file does only have to be prepared/created once per tender, if it is prepared; any other person having access to the tender will be able to download directly without having to prepare the zip-file again. If there are any changes to the supplier documents, the total zip have to be prepared again.

Prepare and download are available from the online comparison/evaluation view,



BoQ overview:

The BoQ overview provides an overview of the Bill of Quantities responses received. To see more details about a specific response, click on the "View BoQ quotation" link for the supplier.

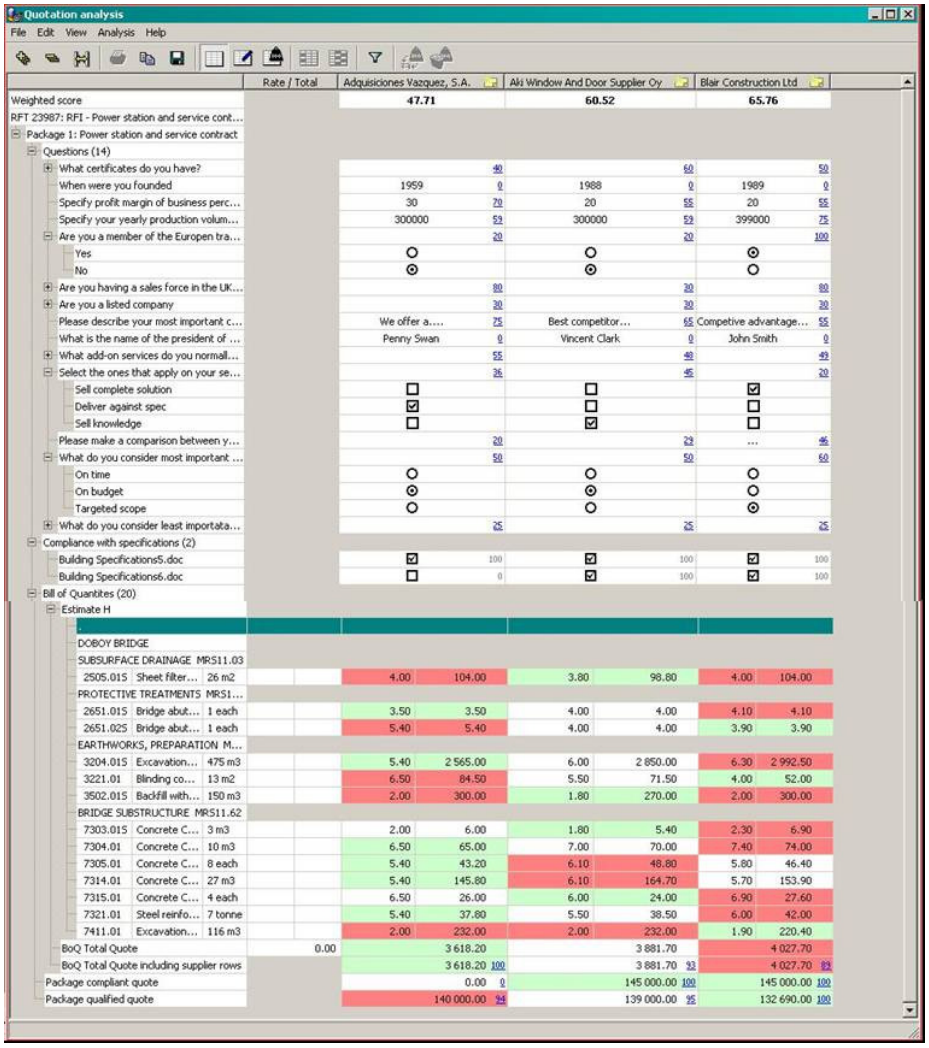


20881 Bill of Quantities

						Subbie 3		Subbie 4	
						View BoQ quotation		View BoQ quotation	
Item #	Description	Unit	Planned cost	Quantity	Planned Total	Price	Total	Price	Total
Package 1 - Assign group to RFQ									
1	Excavation					-	-	-	-
2/SW/1 F	Filling below ground floor slab including compaction to make up levels with imported earth	m3		99.000000		12.000000	1,188.00	13.000000	1,287.00
2/SW/1 E	Ditto with imported earth	m3		203.000000		12.000000	2,436.00	13.000000	2,639.00
2/SW/1 G	Imported filling with 150mm subkha including compaction	m3		49.000000		12.000000	588.00	13.000000	637.00
2/SW/1 J	300mm deep to planters	m2		13.000000		12.000000	156.00	13.000000	169.00
2/SW/1 K	Cartaway surplus excavated material and deposit to selected location off site	m3		158.000000		12.000000	1,896.00	13.000000	2,054.00
3/SW/1 A	Excavate oversite to an average depth of 300 mm	m3		15536.000000		12.000000	186,432.00	13.000000	201,968.00
3/SW/1 B	Excavate pit for foundations not exceeding 1.50 m deep	m3		7572.000000		12.000000	90,864.00	13.000000	98,436.00
3/SW/1 C	Excavate trench not exceeding 1.50 m deep	m3		1616.000000		12.000000	19,392.00	13.000000	21,008.00
				Total Cost (SEK):	.00		302,952.00		328,198.00
					Total Price (SEK):		302,952.00		328,198.00
					Sum of supplier items (SEK):		-		-
					Total price incl. Supplier submitted rows (SEK):		302,952.00		328,198.00

Analysis:

The analysis engine provides a view of all data received in the responses and includes rating functionality to support the selection of the preferred supplier. Since the analysis engine runs locally it is handy to use also when not rating responses.



The analysis engine contains the following main functionalities:

- **Set scores –** A weighted score can be calculated for each response. Through setting scores you rate the responses received. The system then calculates the weighted score for each response.

- **Save settings –** Any settings that you change such as column widths can be saved.

- **Copy –** All data can be copied directly into Excel etc using copy to clipboard.

- **Hide suppliers –** If many suppliers are involved you can select which ones to present to avoid data that you are not interested in.

- **Own price column –** When reviewing BoQ prices received you can save your “own price column” based on the responses for any later use.

- **My rate –** A setting is available which allows the “My rate” column to be populated with estimated rates. Another setting allows the “My rate” column

also to be used to fill in blanks in the responses. These features are available in “Set rate” mode only.

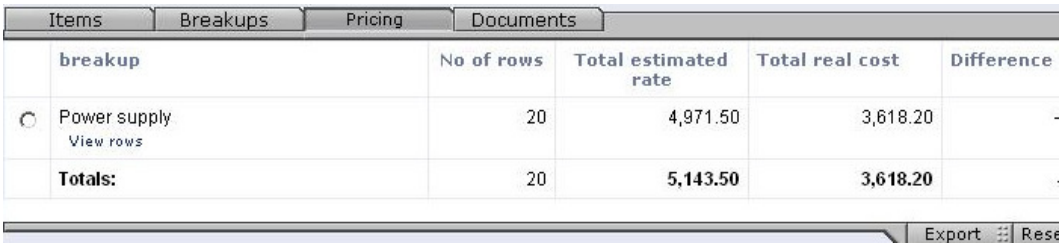
5.2.1 Select supplier BoQ rates

If you are using the BoQ Manager to manage break-ups within a ”Project” it may be desired to be able to see all pricing information received in one place. By selecting supplier rates within issued Tenders the pricing tab in the BoQ Manager is populated with the real pricing information. This can then be compared with the earlier estimates.

To select supplier rates within a Tender:

1. On the Quotation tab, click on the [Select/Export rates] button. Select the Select BoQ quotes option in the drop-down to the upper right.

2. Select the desired supplier and click on [Save]. The pricing tab in the BoQ Manager is now updated with the rates received within this Tender.



5.2.2 Select supplier total quotes

Total quotes and Lots estimates can be set to calculate difference with estimated total and quotes received. You can also fill in a total quote for the supplier if he has not sent in the proposal online or if you have negotiated a new price with the supplier. Note, the new total quote does not override the supplier original quote and it is not shown anywhere else than on the total quotes screen.

To select supplier total quotes:

1. On the Quotation tab, click on the [Select/Export rates] button. Select the “Total quotes” option in the drop-down to the upper right.

2. Select the desired supplier and click [Save].

3. Use the [Set Lot estimates…] to set the estimates of the Lot and see % difference. Fill in the estimates of each Lot and click [Save].

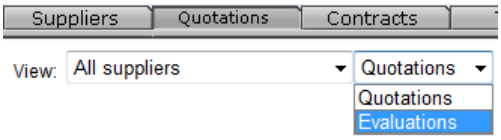
4. To fill in a total quote for the supplier, use the [Edit supplier quotes…]. Fill/change in the total quotes and click [Save]. The supplier quotes updated are now shown on the overview screen, but marked with a blue corner. To remove the filled in supplier total quotes, just leave the total quote field blank.

5.3 Evaluation

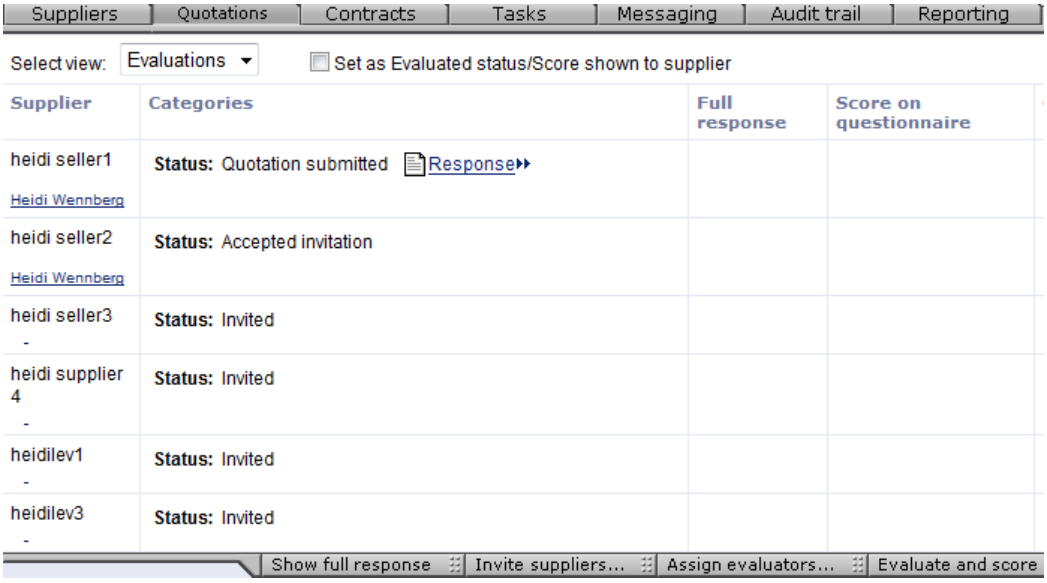
You can make evaluations in several different ways using the analytical engine. As the actual creator of the request for quotation you can evaluate the supplier answers by yourself. If you have created several sections you can assign certain section evaluation to a specific member of your company. There is also the possibility to decide for a team evaluation which means that several team members evaluate the questions and the total score is then an average of all these individual scores.

All the above can also be in some ways decided and overridden by process template settings that decide what is allowed for example if 2-step evaluation should be used (where all gateway questions are step 1 and only companies/suppliers complying with gateway questions are shortlisted to step 2) Below is an example of team evaluation, however, the evaluation where you assign certain sections to specific evaluators is same principle with exception of the “team evaluation” button.

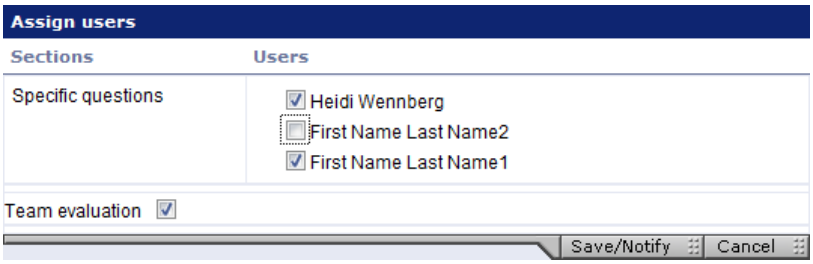
1. Select Evaluation view at the quotation tab.

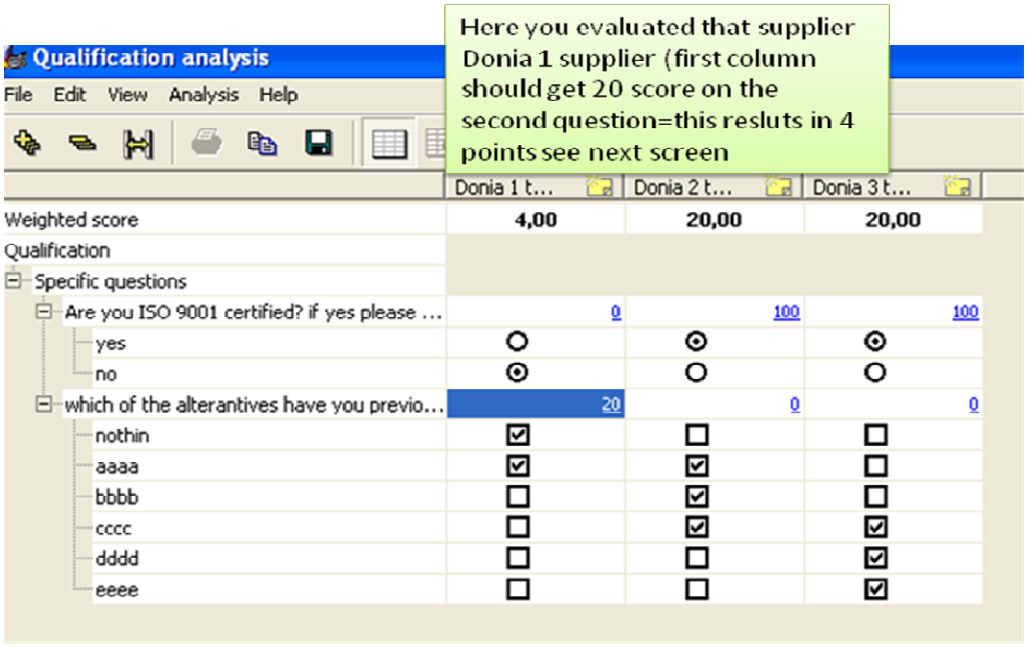


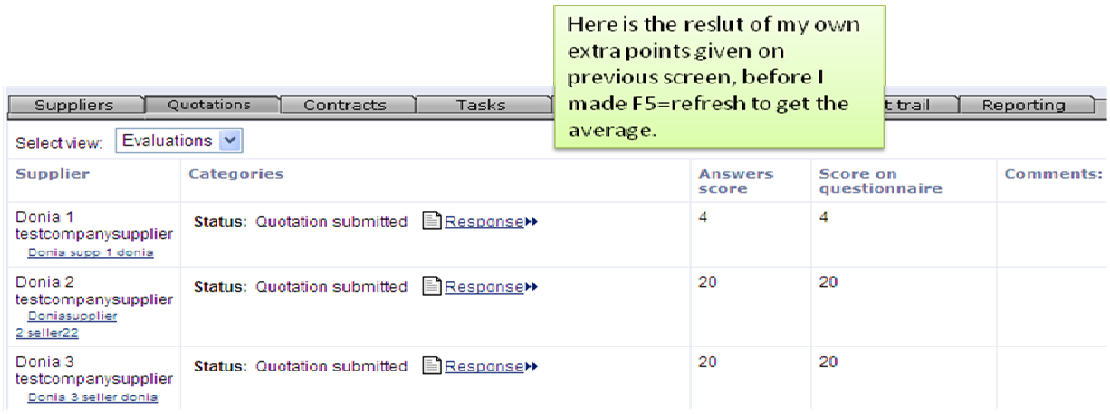
2. Click on Assign evaluators



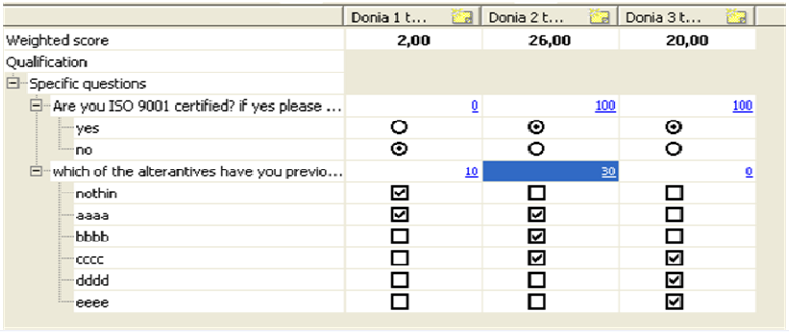
3. Select evaluators click the Team evaluation if you want this functionality


Assign users
Sections
Users
Specific questions
Heidi Wennberg
First Name Last Name2
First Name Last Name1
Team evaluation
Save/Notify
Cancel

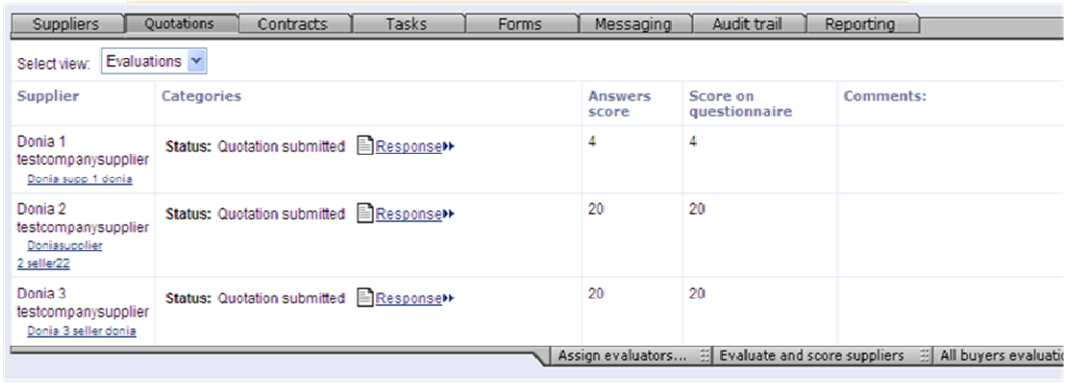

Here you evaluated that supplier Donia 1 supplier (first column should get 20 score on the second question=this resluts in 4 points see next screen
Qualification analysis
File Edit View Analysis Help
Donia 1 t...
Donia 2 t...
Donia 3 t...
Weighted score
4,00
20,00
20,00
Qualification
Specific questions
Are you ISO 9001 certified? if yes please ...
yes
no
which of the alterantives have you previo...
nothin
aaaa
bbbb
cccc
dddd
eeee


Here is the reslut of my own extra points given on previous screen, before I made F5=refresh to get the average.
Suppliers
Quotations
Contracts
Tasks
Reporting
Select view:
Evaluations
Supplier
Categories
Answers score
Score on questionnaire
Comments:
Donia 1 testcompanysupplier
Donia supp 1 donia
Status: Quotation submitted
Response
4
4
Donia 2 testcompanysupplier
Doniasupplier 2 seller22
Status: Quotation submitted
Response
20
20
Donia 3 testcompanysupplier
Donia 3 seller donia
Status: Quotation submitted
Response
20
20

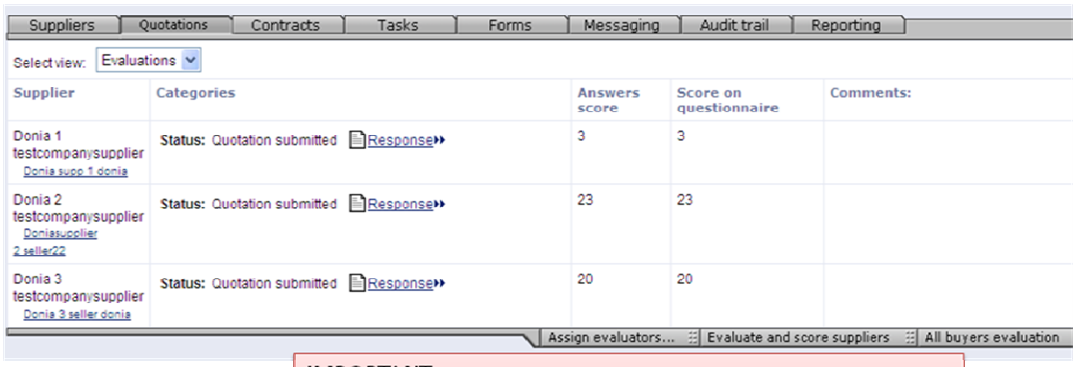
Next evaluator at the company goes into the system and gives scores to the same evaluation view. He can see the average at the moment.



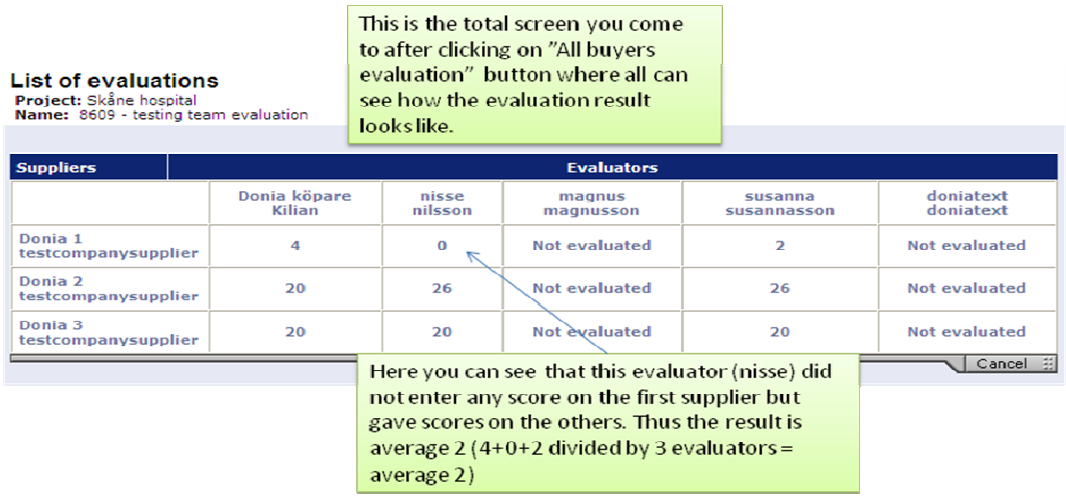
	Donia 1 t...	Donia 2 t...	Donia 3 t...
Weighted score	2,00	26,00	20,00
Qualification			
Specific questions			
Are you ISO 9001 certified? if yes please ...	0	100	100
yes	○	◉	◉
no	◉	○	○
which of the alterantives have you previo...	10	30	0
nothin	☑	☐	☐
aaaa	☑	☑	☐
bbbb	☐	☑	☐
cccc	☐	☑	☑
dddd	☐	☐	☑
eeee	☐	☐	☑



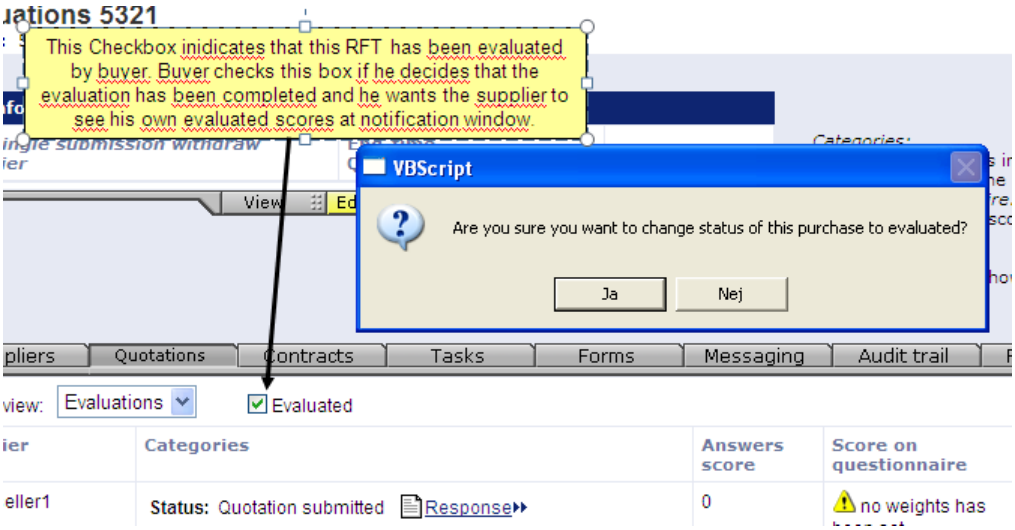
The result (after making F5 for refresh) for the second buyer user is that score for Donia 1 supplier is now 3. First user gave 4 points, second user gave 2 points = the points for that user are now a total of 3 . This is also the view that the third buyer user will have when he enters into the system to evaluate according to same principle as buyer user 2 did.



IMPORTANT
Think about! that if you have been chosen to evaluate a supplier you must in analytical engine evaluate all questions. If you ignore to evaluate one question/supplier the result is then score 0 for that question thus the middle value will be effected negatively for this supplier.



This is a new setting at buyer side which indicates the Tender has been evaluated by buyer. This feature is implemented by adding a checkbox at evaluation page. Buyer checks this box if he decides that the evaluation has been completed and want the supplier to see the evaluated scores.
Supplier will see just his/her own evaluated score not others (QQ, BoQ, Quotation).



5.4 Addenda

Changes as well as negotiation may continue throughout the entire process. As a buyer you can make changes until the Tender is closed. Suppliers may make changes until End time quotation has passed or they are locked (see Section 5.1.4 Remove and Lock/Unlock).

5.4.1 Buyer makes changes

To change the general configurations of the process:

1. On the Tender main page, click on the [Edit from checklist…] button. The Edit Tender checklist page is displayed.

2. Click on the [Edit…] button at the bottom to change the settings for the procedure

3. Perform the desired adjustments and click on the [Save] button.

The following restrictions apply for changes of the process:

- A tender box cannot be added/removed after creation of the Tender
- The tender conditions cannot be changed after having been accepted by a supplier.
- No changes can be made to the process after the awarded supplier has been selected.

To change the content of a Lot:

1. From the home page, click on the My Request for Tenders link. The My Request for Tenders screen displays.

2. From the My Request for Tenders screen click on the required Tender.

3. Click on the [Edit from checklist…] button. The Edit Tender checklist page is displayed.

4. Use the different parts in the checklist to edit the content as described in Section Editing the Tender and setting up response.

All changes made are logged and can be reviewed on the Audit trail list tab. This way it is easy for you, as well as the involved suppliers, to see what changes have occurred and when. You can see information about all suppliers while each supplier only sees your and his own changes.

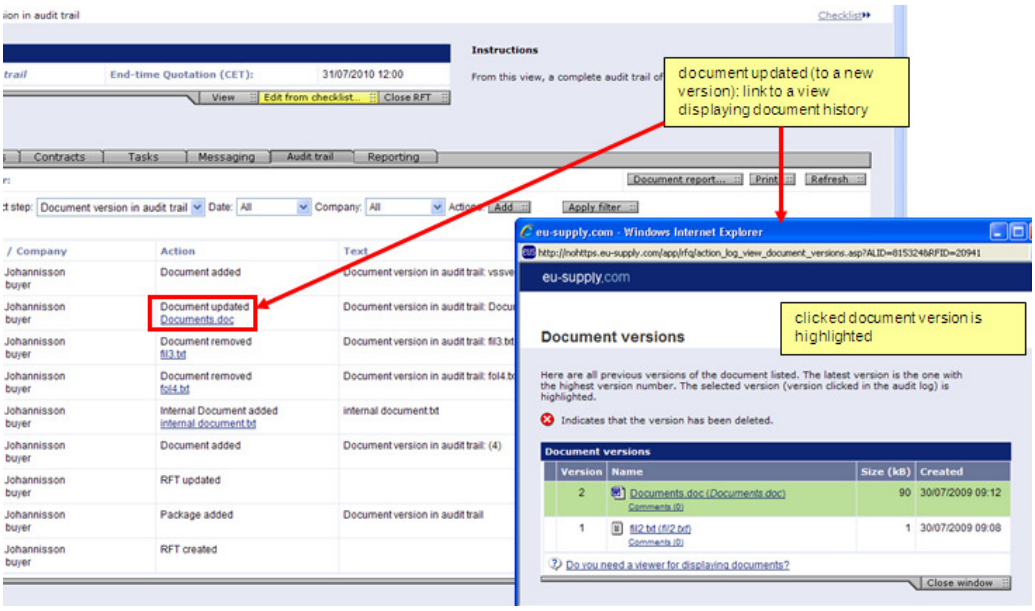
Time	User / Company	Action	Text	Options
27/09/06 09:24	First admin Buyertavast1 Buyertavast1	Document added	Power station and service contract:Standards.xls	
27/09/06 08:42	First admin Buyertavast1 Buyertavast1	BoQ item updated	7303.01S: The estimated rate has been updated.	
26/09/06 18:47	David Blair Blair Construction Ltd	Quotation submitted		
26/09/06 18:47	David Blair Blair Construction Ltd	Document added	Power station and service contract: Financial specification.doc	View document
26/09/06 18:46	David Blair Blair Construction Ltd	Quotation set		
26/09/06 18:45	David Blair Blair Construction Ltd	Qualification question answered	Power station and service contract	
26/09/06 18:43	David Blair Blair Construction Ltd	Confirmation of compliance with specification set	Power station and service contract: Building Specifications5.doc, Building Specifications6.doc,	
26/09/06 18:43	David Blair Blair Construction Ltd	Invitation accepted	Blair Construction Ltd	
26/09/06 18:43	David Blair Blair Construction Ltd	Invitation viewed	Blair Construction Ltd	
26/09/06 18:41	Donia Donia Aki Window And Door Supplier Oy	Quotation submitted		
26/09/06 18:40	Donia Donia Aki Window And Door Supplier Oy	Document added	Power station and service contract:000_other_info.pdf	View document

The Tender Audit Trail tab displays a link to document version history when a document is uploaded, updated (to a new version) or deleted.

This document version history window displays all prior and newer versions of the document; all versions are enabled for view/download. The version clicked in the audit trail is highlighted and an icon indicates if a version has been removed.

Supplier side: If a document is changed on the buyer side and the supplier have access to the document (i.e. supplier has accepted the invitation), the supplier may view the history of the document in the Tender audit trail. Only versions valid at and created after the first supplier accepted the invitations are available, i.e. all suppliers can access the same buyer document versions.

Buyer side: If the supplier has submitted his proposal and any document attached to the response are changed, the buyer may view the supplier document version history in the Tender audit trail. Only versions valid at and created after supplier have submitted the proposals are available.


document updated (to a new version): link to a view displaying document history
clicked document version is highlighted
eu-supply.com - Windows Internet Explorer
eu-supply.com
Document versions
Here are all previous versions of the document listed. The latest version is the one with the highest version number. The selected version (version clicked in the audit log) is highlighted.
Indicates that the version has been deleted.
Document versions
Version
Name
Size (kB)
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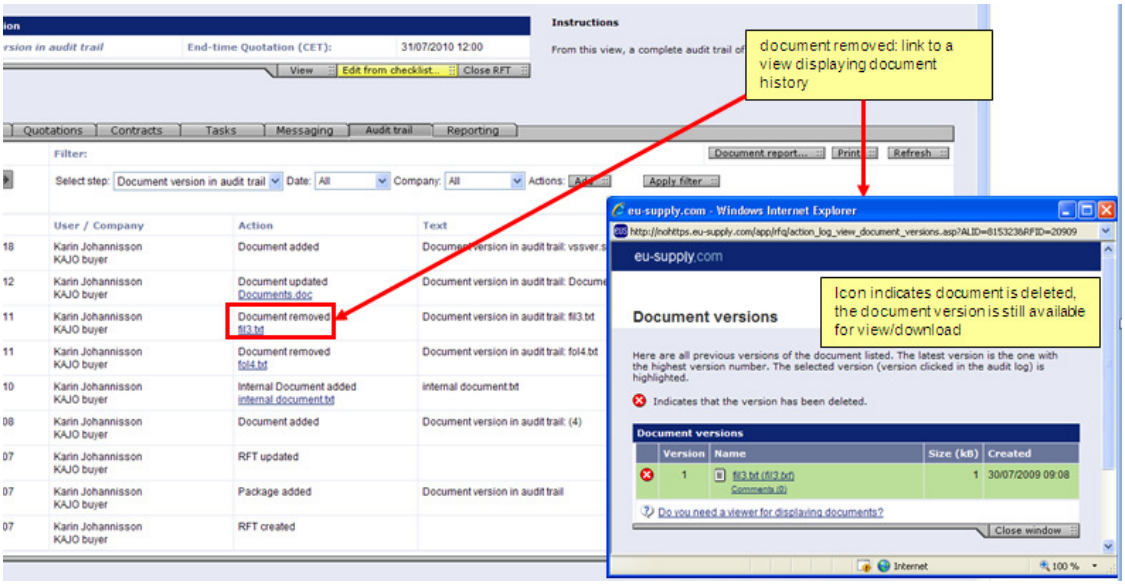
document removed: link to a view displaying document history
Icon indicates document is deleted, the document version is still available for view/download
eu-supply.com - Windows Internet Explorer
eu-supply.com
Document versions
Here are all previous versions of the document listed. The latest version is the one with the highest version number. The selected version (version clicked in the audit log) is highlighted.
Indicates that the version has been deleted.
Document versions
Version
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Size (kB)
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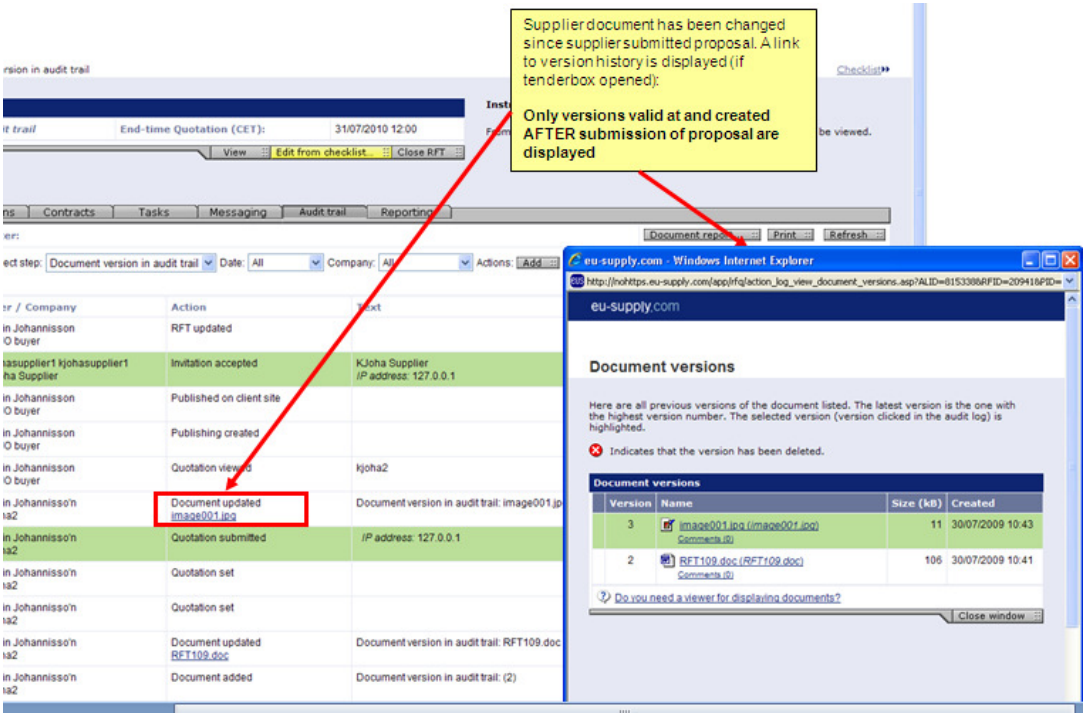
Close window



5.4.2 Inform suppliers

If you require a quicker response you can also notify the suppliers when changes have been made to the Tender.

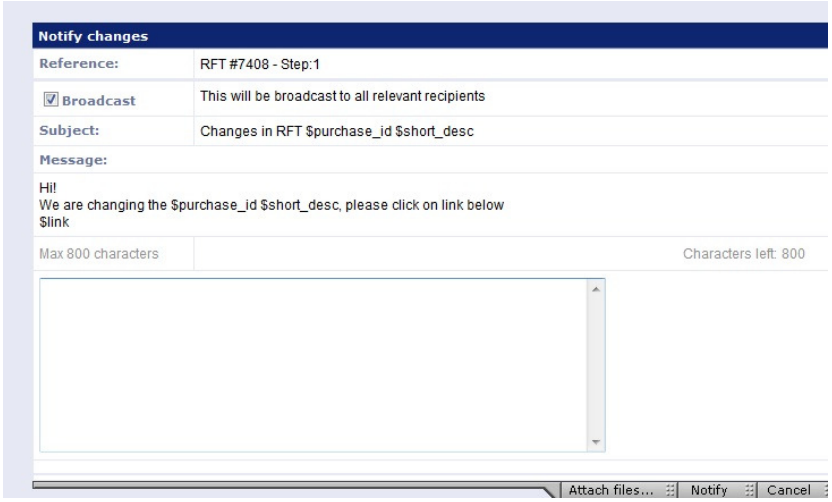
To notify the involved suppliers:

1. From the home page, click on the My Request for Tenders link. The My Request for Tenders screen displays.

2. From the My Request for Tenders screen click on the required Tender and quotation step. Alternatively this should be made from the left hand side of the Checklist - from the Administration page

3. Click on the [Notify changes…] button.

4. Select the suppliers that you want to inform and click the [Notify] button. You can also click on [Attach files] the “attached” will be found in the message tab for the supplier to find. Alternatively you select to Broadcast this message meaning it will be sent to all current och future suppliers added or entering the tender before deadline.

5. 

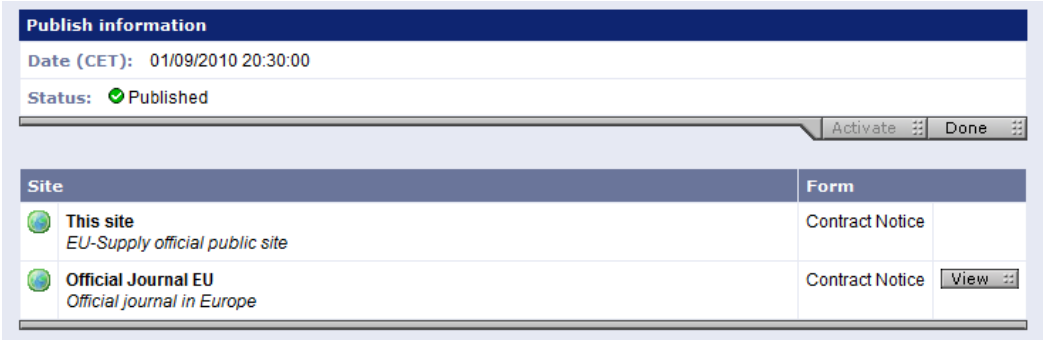
6. The suppliers are notified of the changes made.

If a supplier already has submitted a response, their status can also updated to “re-confirm quotation” if you decide this by answering yes when this question pops-up.

5.4.3 Amending the notice

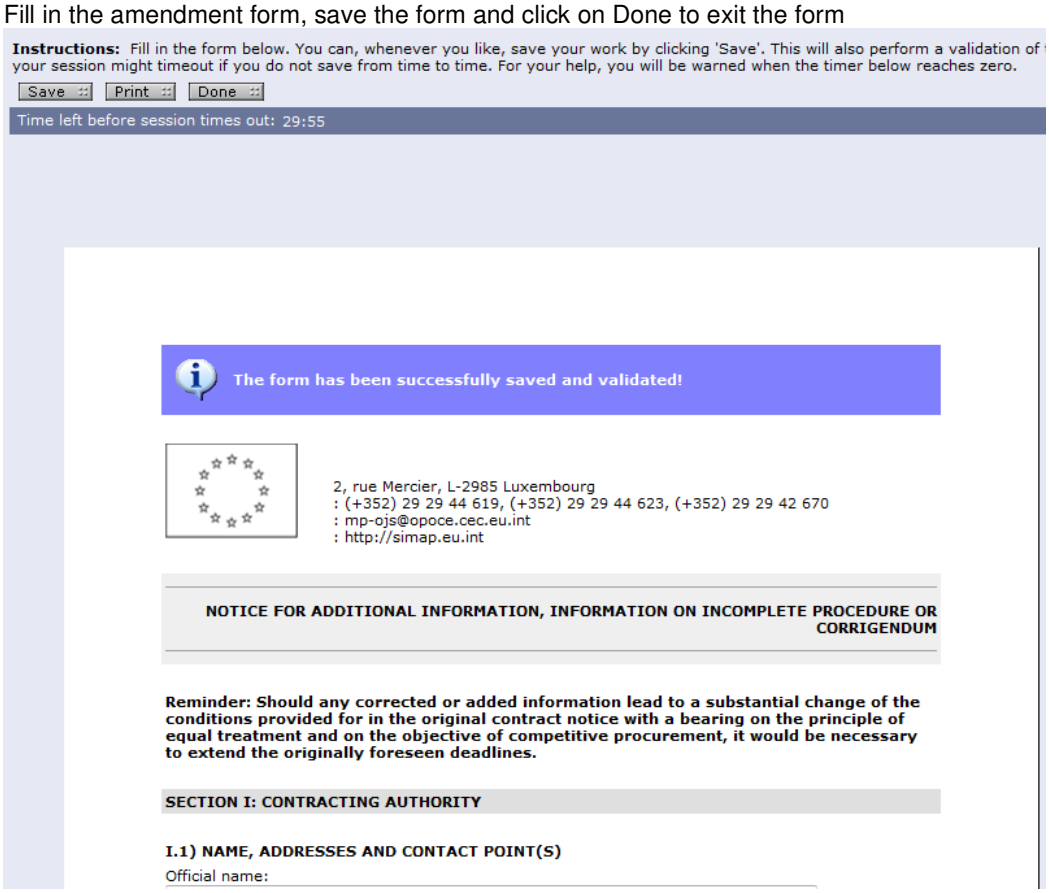
1. From the checklist go to Publish link

2. Click on View next to the contract notice

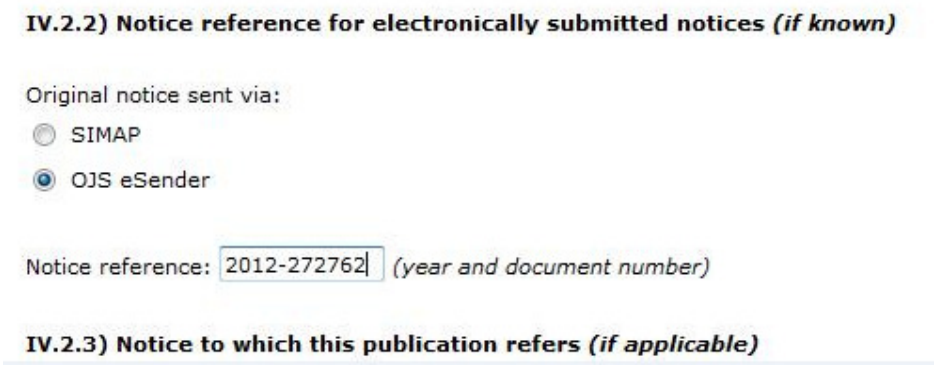


3. Click on Add amendment

4. Fill in the amendment form, save the form and click on Done to exit the form



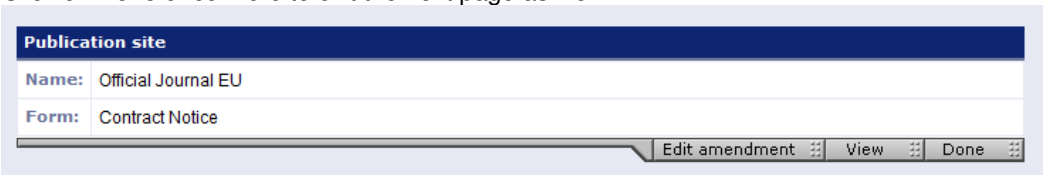
NOTE: You need to state the orginal contract notice reference number in this field.



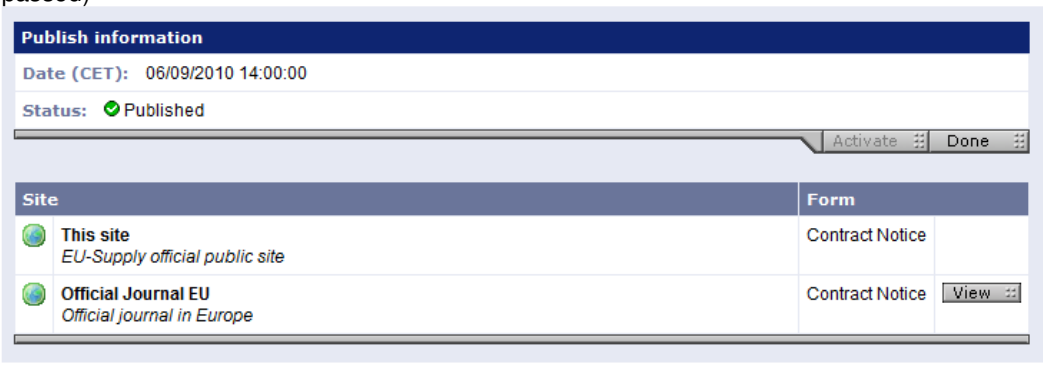
And the place where this number can be verified from is in your audit trail, se below from audit trail.

Time (BST)	User / Company	Action	Text
15/03/2012 08:33	Firstadmin Buyertavast1 POE Ltd (bt1)	Published to OJEU	2012-272762
15/03/2012 08:33	Firstadmin Buyertavast1 POE Ltd (bt1)	Published on client site	
15/03/2012 08:32	Firstadmin Buyertavast1	Publishing created	

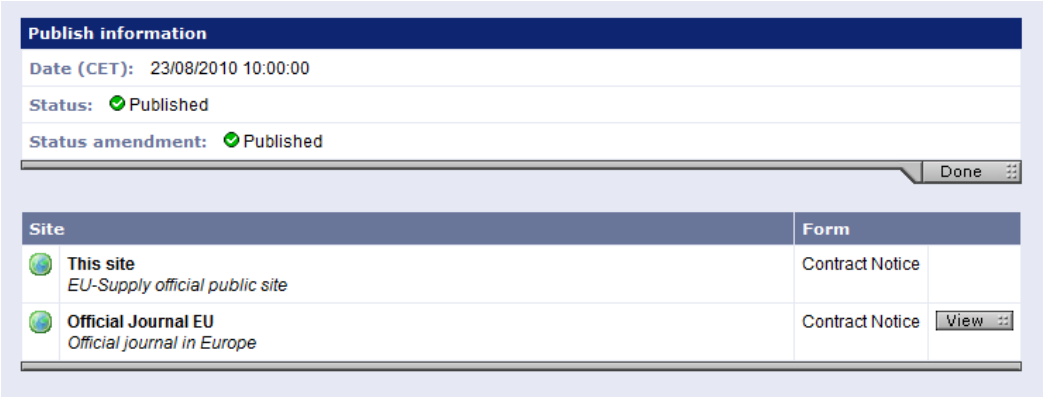
5. Click on Done once more to exit the next page as well



6. Click on Activate, (if not possible it might be due to fact that the end-time has passed)



7. See the result



5.4.4 Buyer receives addenda from suppliers

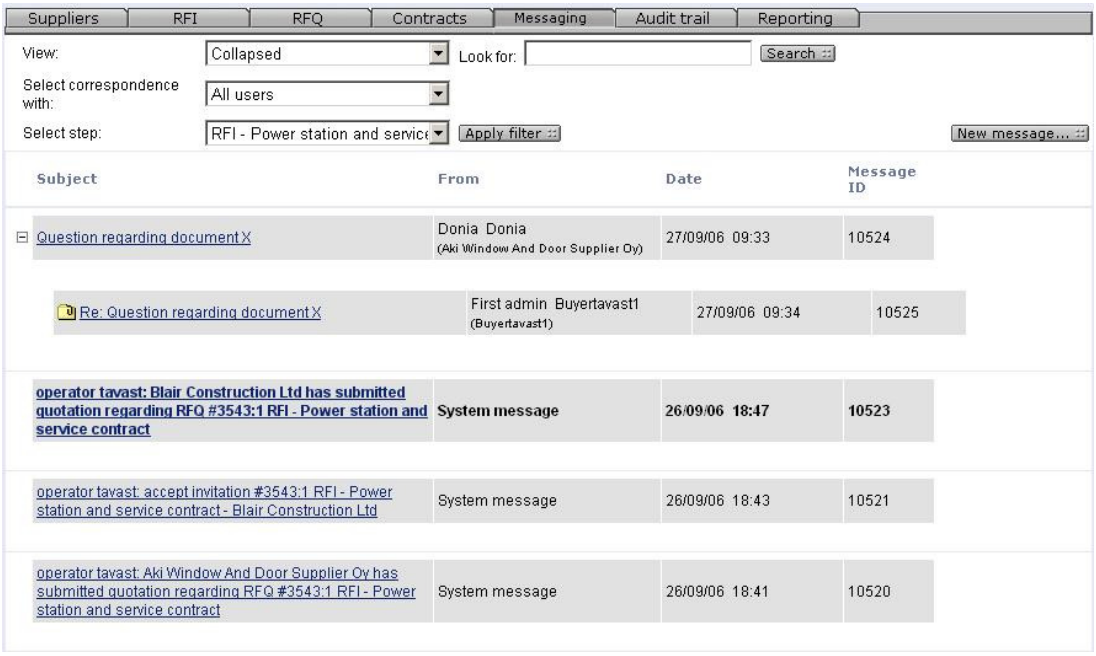
Suppliers may make changes to their response and submit new versions until end time quotation has passed or they are locked. In the same way as the suppliers can follow the buyer changes through the audit trail you as a buyer can see any changes made by suppliers in the audit trail.

5.5 Messaging

A messaging system supports the logging and trail of any communication during the process. You can send messages to and receive messages from the different users involved from the supplier companies and involved colleagues.

On the first page after login all unread messages are listed to ensure that messages are not left unattended.

The { Messaging } tab presents all communication taken place within a specific Tender in a discussion forum format. To view a message, click on the subject.

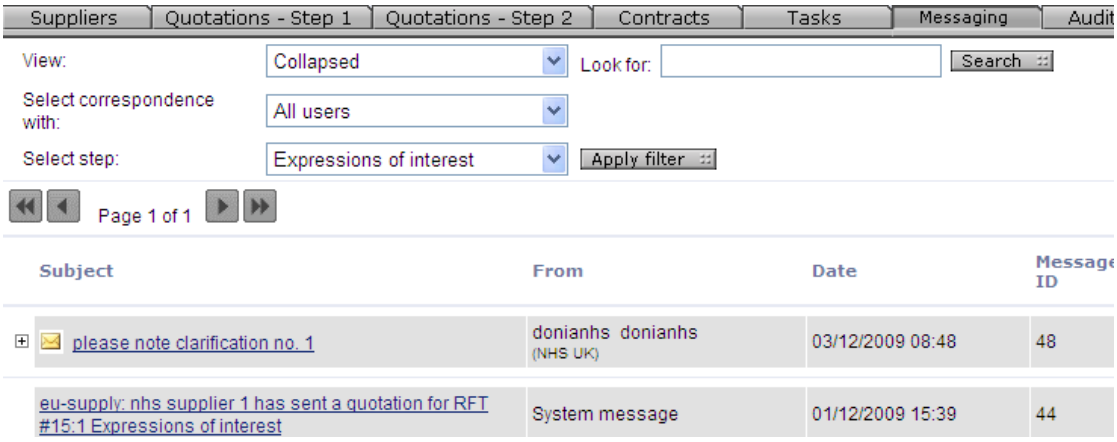


The system generates messages to inform you when important events occur. The events are listed in Section 9.1 Edit user profile. Within your user profile you can also select to receive these automatic generated messages as emails.

To ensure that sub messages are left unread by mistake because they are not visible in case expansion button is clicked, a new feature is developed in Messaging to highlight any such unread sub messages for the user (both on the supplier and the buyer side).

This is highlighted by an unread sub message icon.
Unread message at the top is presented as bold.

Similarly, to ensure that any draft message prepared is not left unsent by mistake, an Unsent Draft icon is presented to the user (both on the supplier and the buyer side) and highlighted in red.



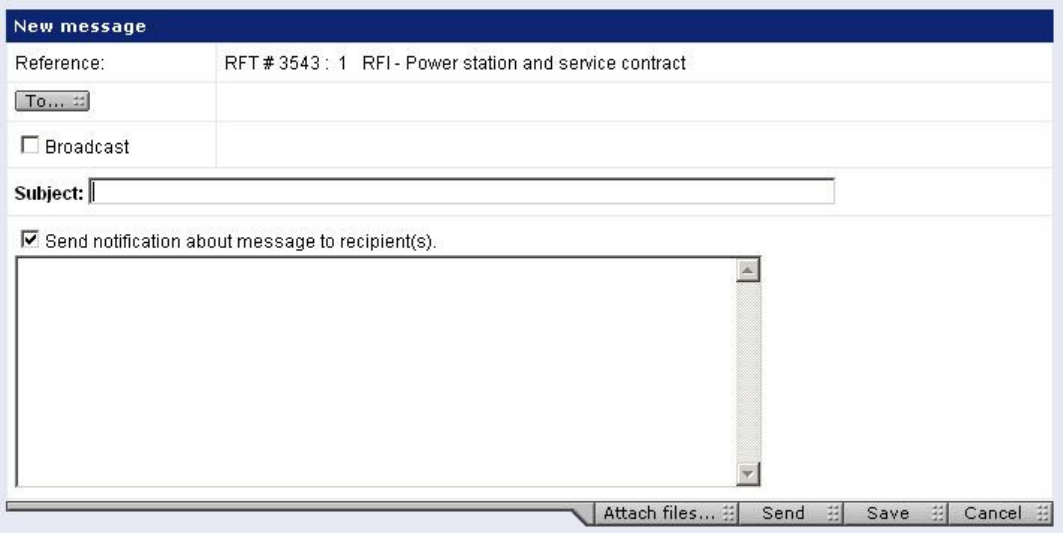
5.5.1 Send a message

To send a message within a Tender:

1. Go to the desired Tender and the { Messaging } tab, alternatively go directly to create a message from the left hand side of the checklist

2. Click on the [New message…] button.

3. The New message window is displayed.



4. Click on the [To…] button to select the recipients and click the [Select] button.

5. There is the option to broadcast the message to all suppliers invited, and all that will be invited to the Tender. If the broadcast option is selected, no recipients need to be selected.

6. Enter a suitable subject.

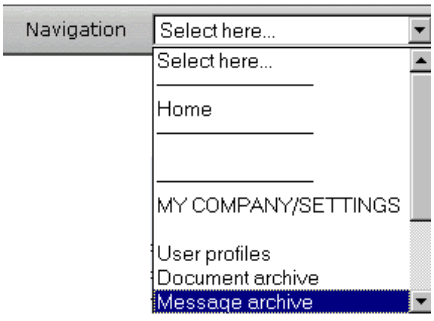
7. To attach a document from the PC, click on the [Attach files…] button and select the file(s) to upload. For more information about Document Management, see Section 9.4.1 This document will NOT be attached as a e-mail attachment-the supplier has to log into the system, go the the messages tab and download the attachment from there.

8. Click on the [Send] button to send the message.

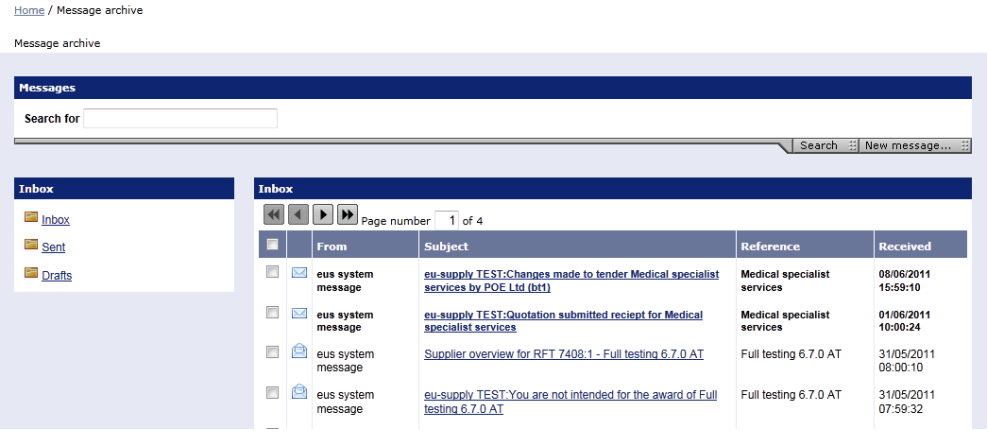
When sending a message you have the option to check the notification box. This sends an immediate email notification that there is a new message available on the system.

5.5.2 Message archive

If you want to review all messages independent of Tender you can use the Message archive. The Message archive is reached through the Navigation bar.



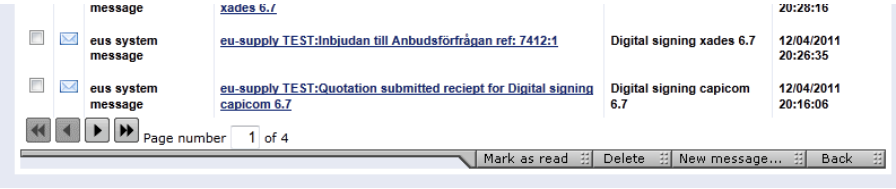
The Message archive displays the messages in a traditional email client layout.



If a message is created and saved but not sent it is listed in the drafts folder in the Message archive.

If a message is deleted it is removed from the system.

You can mark a message as read by selecting the message in question and clicking on Mark as read.



5.6 Short-list suppliers for next step within Tender

If you run a multi-step process and are done with evaluations you can short-list the suppliers you want to bring with you to the next step.

To short-list suppliers for the next step:

1. Click on the [Quotations] tab for the current step.
2. Click on the [Short list…] button.
3. Select the suppliers that you want to short-list and click the [Short list] button.
4. The short-listed suppliers are displayed on the Quotation tab for the following phase and can be invited, same supplier contact persons that had rights in step 1 will be possible to send to for step 2.

The invitation to the following step follows the steps as listed above. Any documents, BoQ items and qualification questions can be added to the second step independently of the first step.

5.7 Award preferred supplier

If you have run through one or multiple Tender steps, and have decided to award one or more suppliers, the award can be managed online independently of if you are to run the contract management process online or not.

To select the preferred supplier:

1. Click on the [Award supplier..] button.

2. Select the supplier that you want to continue with and click on the [Save] button.

3. Enter a reason for awarding the selected supplier and click on the [Save] button.

4. Suppliers are not notified automatic by the system (unless the Alcatel directive is in place), the buyer has to send the award notification to the suppliers. This could be done by using the [Create message] functionality within the award screen, you can select from a pre-defined email template to send the award notice to suppliers.

5.7.1 Using the Alcatel directive

The Alcatel directive is a set of rules applied within the EU to ensure suppliers get a chance to challenge any award made within a specific period of time, called the standstill period. The standstill period is specified when awarding the supplier.

To award a supplier with a standstill period:

1. Click on the [Award supplier..] button.

2. Select the preferred supplier using the radio buttons

3. Select an award standstill period, i.e. the time period for how long the suppliers can challenge the award of suppliers.

4. Click the [Save] button, the reason screen appears. Enter a award reason and click the [Save]

5. Any suppliers not awarded will now receive an automatic message saying they were not successful in the tender, and they have until the standstill end to challenge and request an award report.

6. You can at any time go in and extend the standstill period by using the [Award supplier] button from the { Quotations } tab

To send an award report:

1. If an award report is requested by the supplier you will be notified via a message on the system and email.

2. Go to the Tender where the report was requested and the { Quotations } tab. Click the [Award supplier] button

3. Use the Send report link for the supplier who requested the report. A small pop-up window opens.

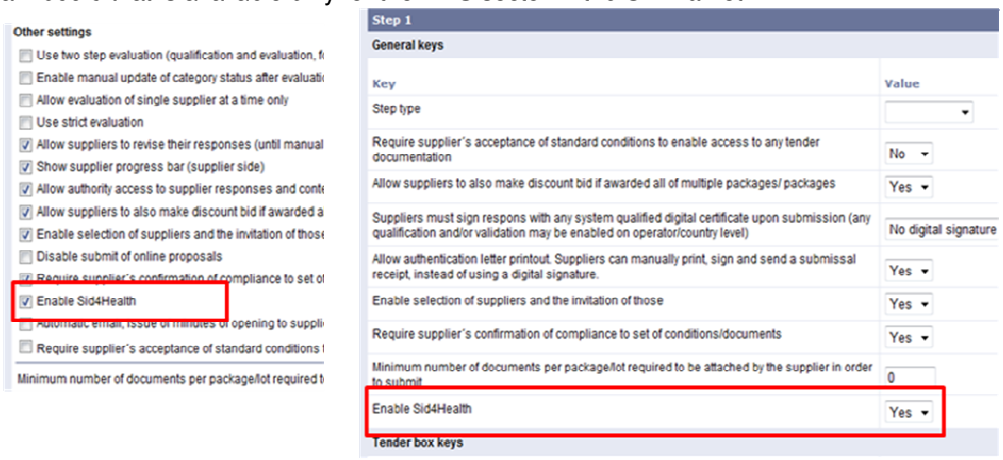
4. Click the [Send report] button to send it to the supplier.

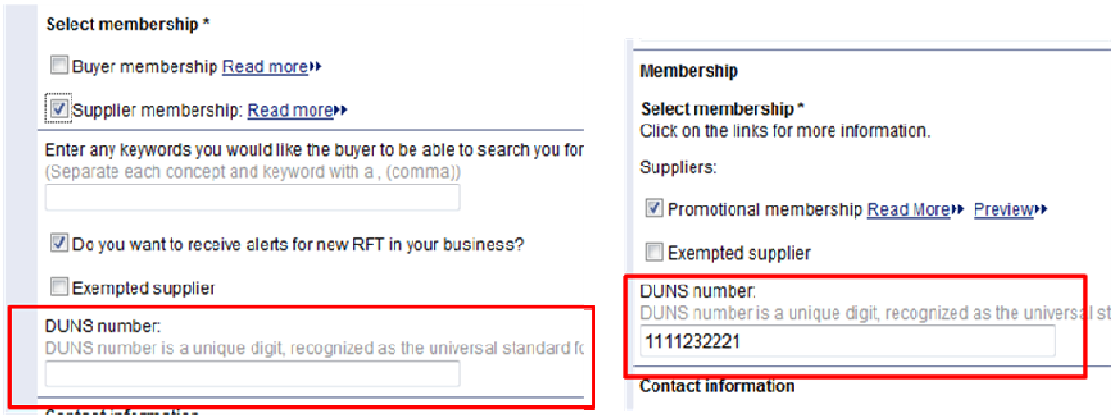
5. From the { Audit trail } you can click on a link to see the full report sent to the supplier.

Section 6: Sid4Health module

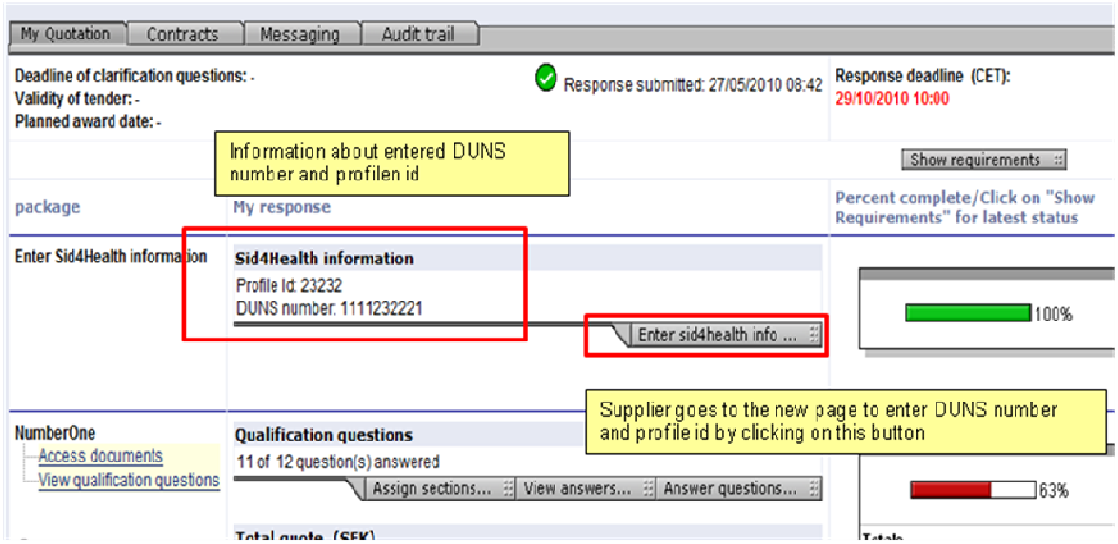
6.1.1 Setting

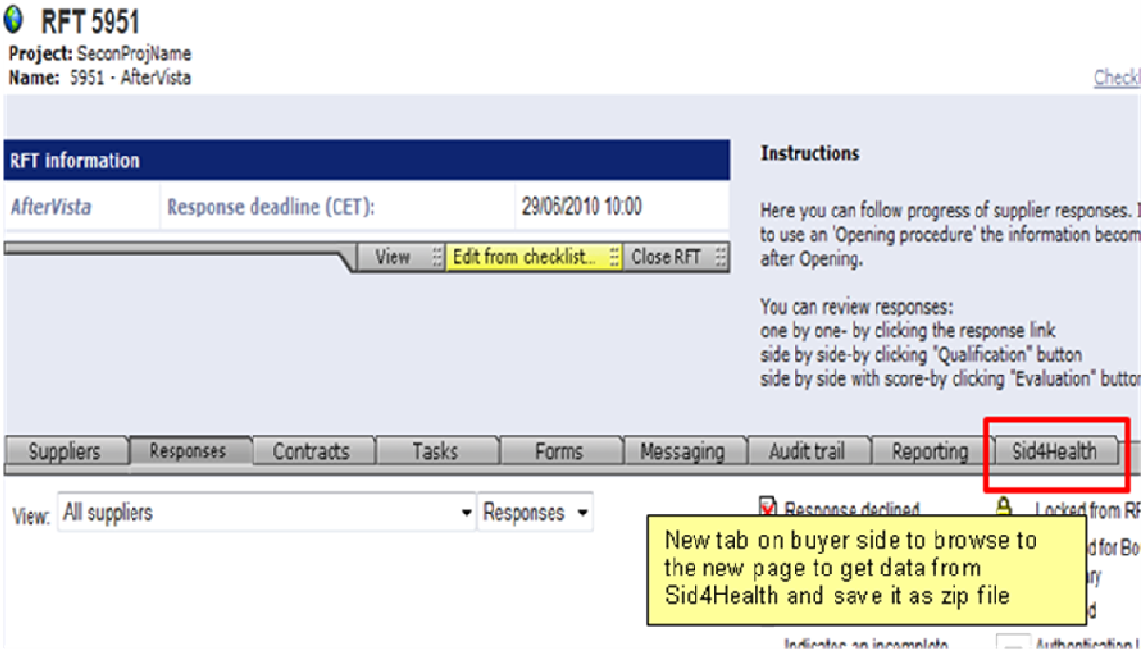
You enable Sid4Health by ticking the equivalent setting in the process template, this setting will only be visible if the module is switched on within your organization. It is a module that is available only for the NHS sector in the UK market.

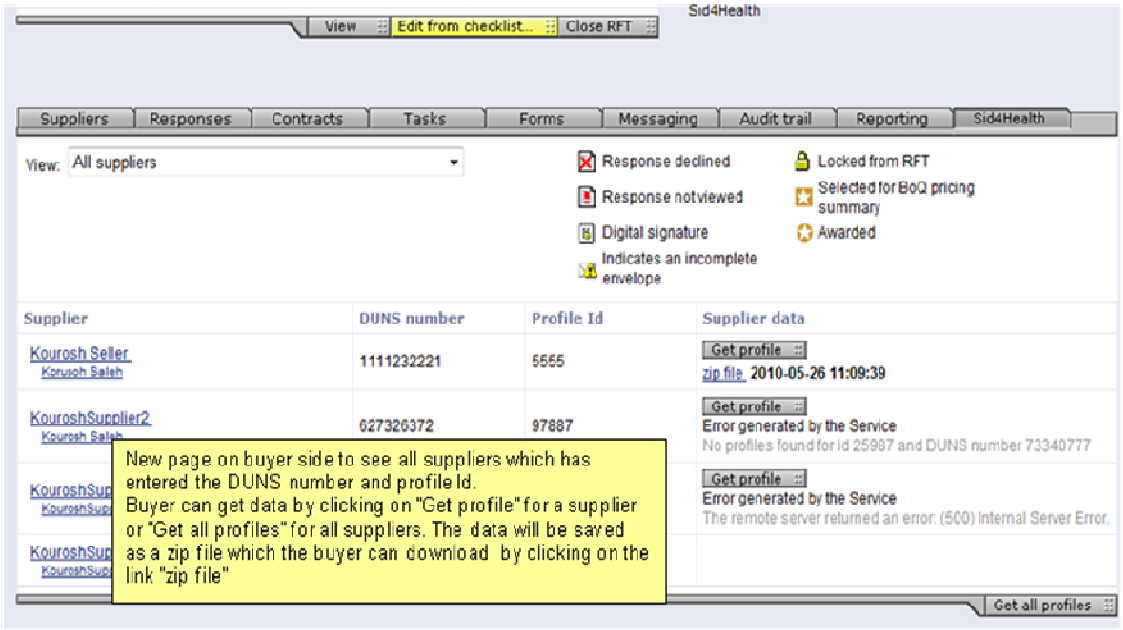




Supplier enters DUNS number during registration or editing company details


My Quotation
Contracts
Messaging
Audit trail
Deadline of clarification questions: -
Validity of tender: -
Planned award date: -
Response submitted: 27/05/2010 08:42
Response deadline (CET):
29/10/2010 10:00
Information about entered DUNS number and profilen id
Show requirements
package
My response
Percent complete/Click on "Show Requirements" for latest status
Enter Sid4Health information
Sid4Health information
Profile Id: 23232
DUNS number: 1111232221
Enter sid4health info ...
100%
Supplier goes to the new page to enter DUNS number and profile id by clicking on this button
NumberOne
Access documents
View qualification questions
Qualification questions
11 of 12 question(s) answered
Assign sections...
View answers...
Answer questions...
63%


RFT 5951
Project: SeconProjName
Name: 5951 - AfterVista
RFT information
AfterVista
Response deadline (CET):
29/06/2010 10:00
View
Edit from checklist...
Close RFT
Instructions
Here you can follow progress of supplier responses.
to use an 'Opening procedure' the information becom
after Opening.
You can review responses:
one by one- by clicking the response link
side by side-by clicking "Qualification" button
side by side with score-by clicking "Evaluation" buttor
Suppliers
Responses
Contracts
Tasks
Forms
Messaging
Audit trail
Reporting
Sid4Health
View: All suppliers
Responses
New tab on buyer side to browse to the new page to get data from Sid4Health and save it as zip file



Section 7: Mini-Quote module

The mini-quote is a simpler version of an ordinary tender which also is preceeding by a pre-qualification of suppliers.

The whole process starts with a supplier pre-qualification, where the contracting authority publishes or invites to a tender containing only a qualification questionnaire. The qualification questionnaire will serve as a base for the upcoming mini-quotes based on the pre-qualification. The suppliers fill in the qualification and submit their answers. The contracting authority gathers all the supplier answers and evaluates if they are approved to be used for the mini-quotes.

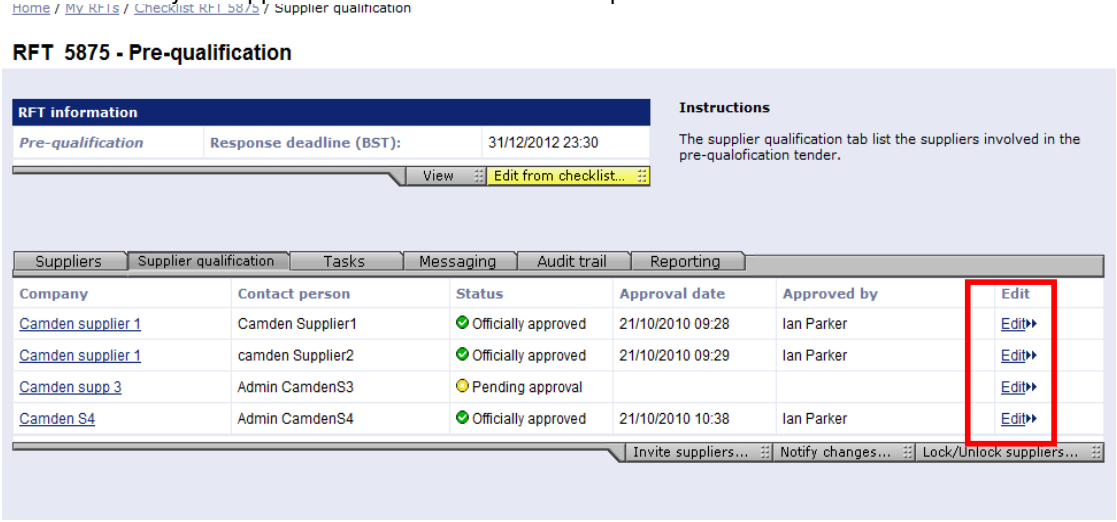


Fig 20. Pre-qualification overview screen

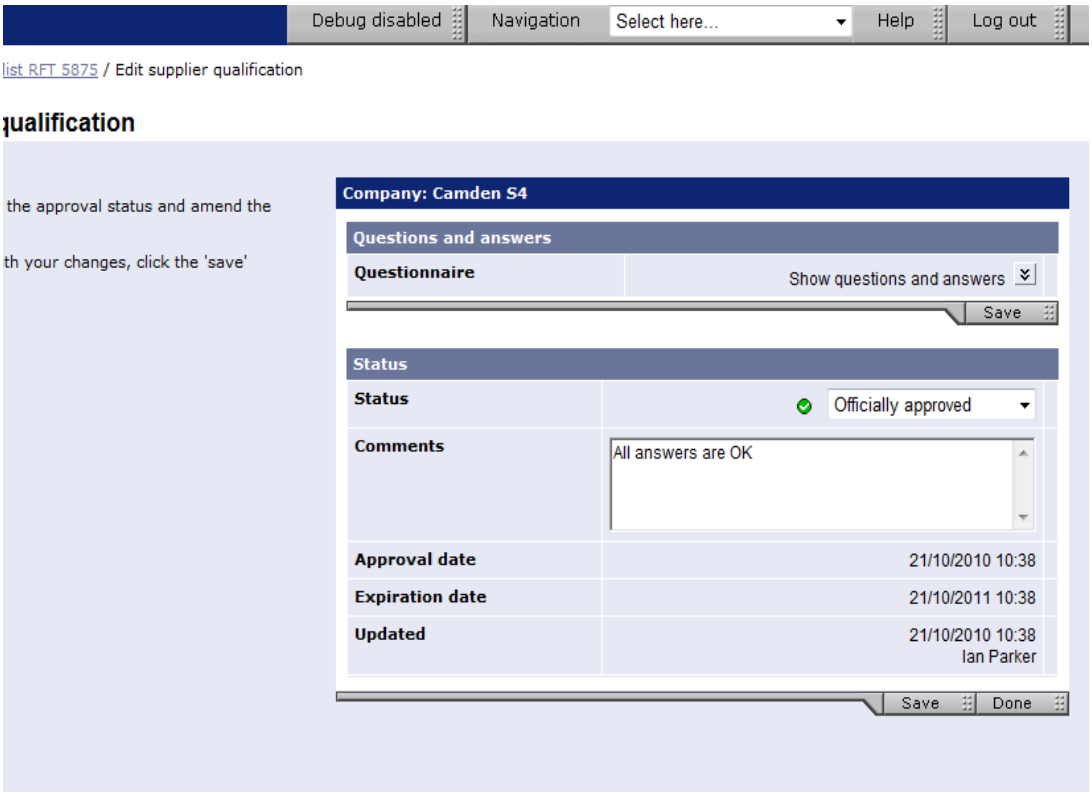


Fig 21. Edit the pre-qualification status for a supplier

A company administrator is the only role who can update the pre-qualifications.

After the qualification the contracting authority can start creating their mini-quotes, a mini-quote is essentially a mini-tender and can include any information an “ordinary” tender includes, such as Price Schedules, documents and total quotes.

Searching and adding suppliers to a mini-quote can only be done in one way and that is by selecting a search criterion (see picture below) using the pre-qualification questionnaire. The search result will display a list of suppliers compatible with the search criteria, and the user can only select to add the result of suppliers, no more suppliers can be added or removed from the mini-quote.

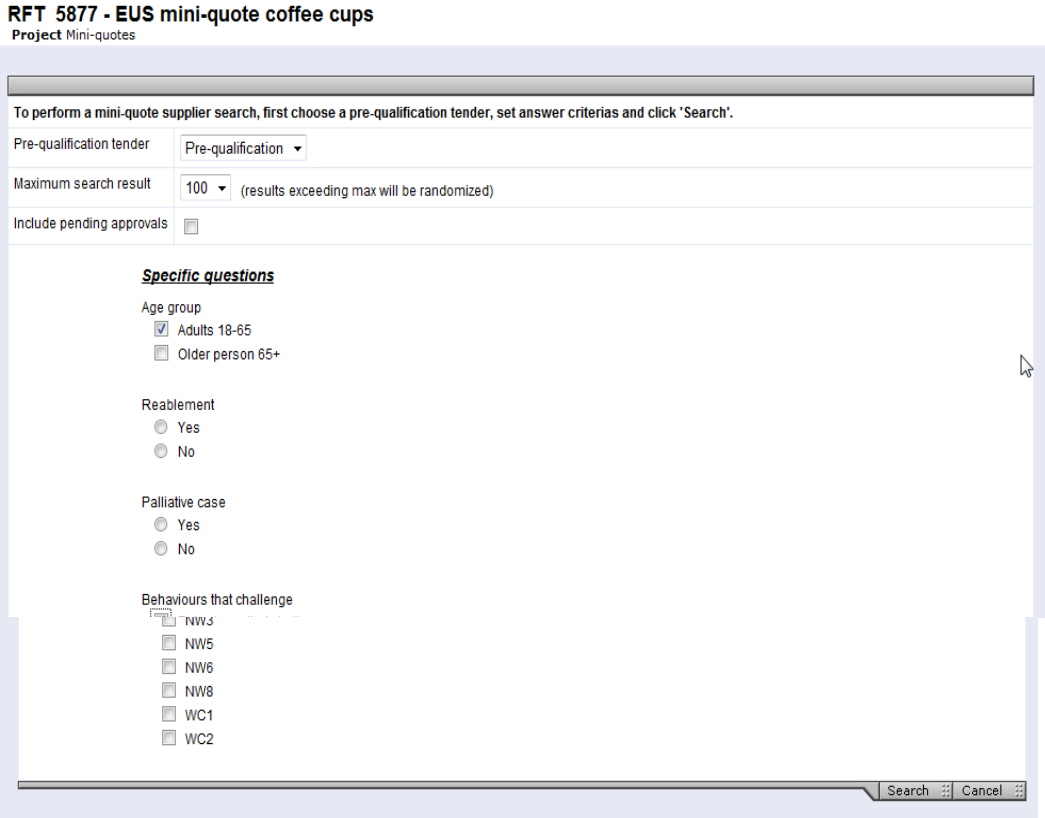


Fig 22. Search screen of the mini-quote

After adding of the suppliers, the process is as any normal tender with any options the contracting authority chooses.

Selecting a tender as pre-qualification and mini-quote is done by defining process templates for each part.

The pre-qualification/mini-quote is a system module, please contact EU-Supply or one of our partners for commercials.

Section 8: Questions and Answer (Q&A) module

The Q&A (Questions and Answers) is a new module within a tender which can be used for broadcasting anwers when a question is initiated from the supplier. All functionality within messaging in a tender is also available

The process is as follows, the suppliers asks questions during the tender, the contracting authorities have the possibility to revise the questions to remove any specific supplier information and then publish the answers to all suppliers. The published answer and the question is available to any supplier who has expressed interest in a tender.

The supplier will not have the possibility to ask any questions once the deadline for clarification questions has passed. The deadline is set up by the contracting

authority in each tender, if no deadline is specified then the suppliers can ask questions until tender deadline.

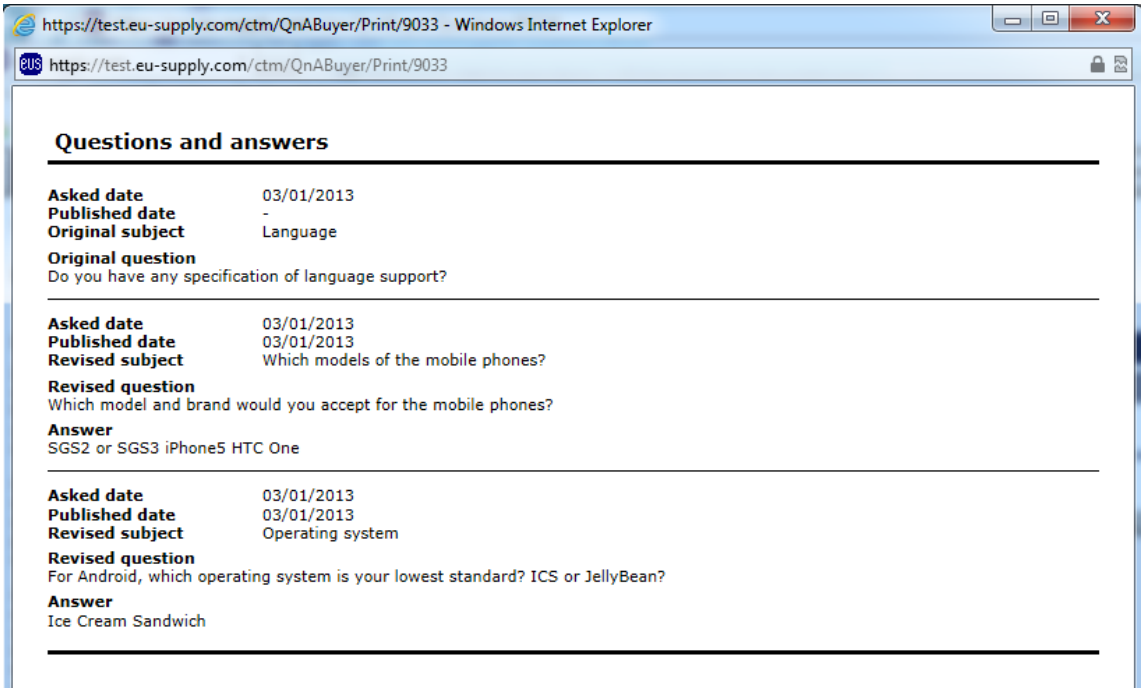
Please contact your local EU-Supply sales office for license details of the Q&A module.

8.1 User view

The contracting authority will see all questions asked by suppliers during the tender process. Access to the questions asked by suppliers and the possibility to answer them is available from the tender checklist.

You as a contracting authority and owner of a tender will be notified via email when there is a new question asked by a supplier.
Questions asked by suppliers are listed as “Questions and answers” on the Q&A page in CTM. In that list you seewhen the question was recived and which supplier that asked the question.You access and answer the question by clicking on the subject of the question.

Once an answer has been given, the question is shown in the “Answers ready to publish” list below the and can be published. Select the answer to publish and click the Publish button. Once the answer has been published it cannot be edited or re-published. The question and answer will be able to read by all suppliers.
Once a question has been published you can access it and see which suppliers who have read the answer.
There is also a printer friendly version of the Q&A section.



Section 9: General user information

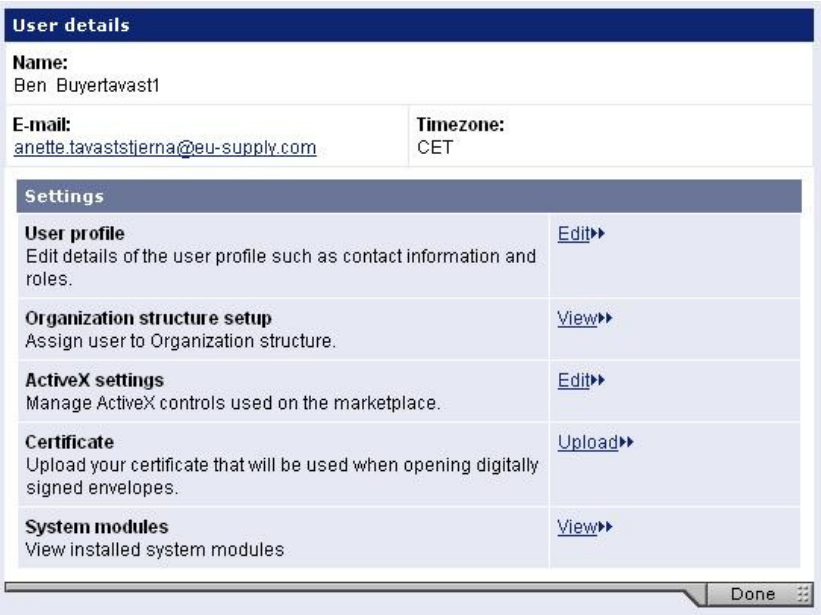
9.1 Edit user profile

You as the logged in user have access to settings and the details regarding your user profile and can also change them on the site.

To edit user details:

1. Select *Personal profile* from the Navigation dropdown. The user details screen is shown

2. Click on the Edit link by the User profile to change user details, such as user name, password, time zone, notification settings, preferred language etc. Change the settings and click [Save].



Notification settings
Notifications are events happening on the system and how you would like to be notified about them. A system message is always sent for a notification, you can choose for each of the notifications if you would like to receive an email as a notification as well.

Active X settings
ActiveX is control which can be downloaded and installed on your computer to gain access to additional functionality within CTM, the ActiveX's are only available on a client Windows platform using the Internet Explorer as web browser. To be able to install the ActiveX you need to have access to install programs on your computer, i.e. being a power user or computer administrator.

To install the ActiveX's one by one, click the [Load] button next to each of the ActiveX. You can also install them all by downloading the complete installation Lot and install.

If you do not have access to install programs, you can download an installation Lot and ask your local support to install the ActiveX-Lot.

The below ActiveX's are currently available

ActiveX	Description
Analytical engine	The analytical engine is used within an Tender to score and evaluate responses received from the suppliers. Developed by eu-supply
Upload manager	The upload manager is a tool to upload multiple files and folder structures from you local disk to any of the document archives on the system. Developed by eu-supply

Chart FX	The Chart FX is used within the eAuction module to display a graph of bids which has been placed during an auction Developed by Software FX
CAPICOM	The Capicom is used to create digital signatures to be used on the site Developed by Microsoft
Flash	The Flash is used to display graphics, for example in a supplier profile and the map-chart. Developed by Macromedia
Digital signature utility	Digital signature utility allows you to digitally sign documents and supplier responses on the site. Developed by eu-supply

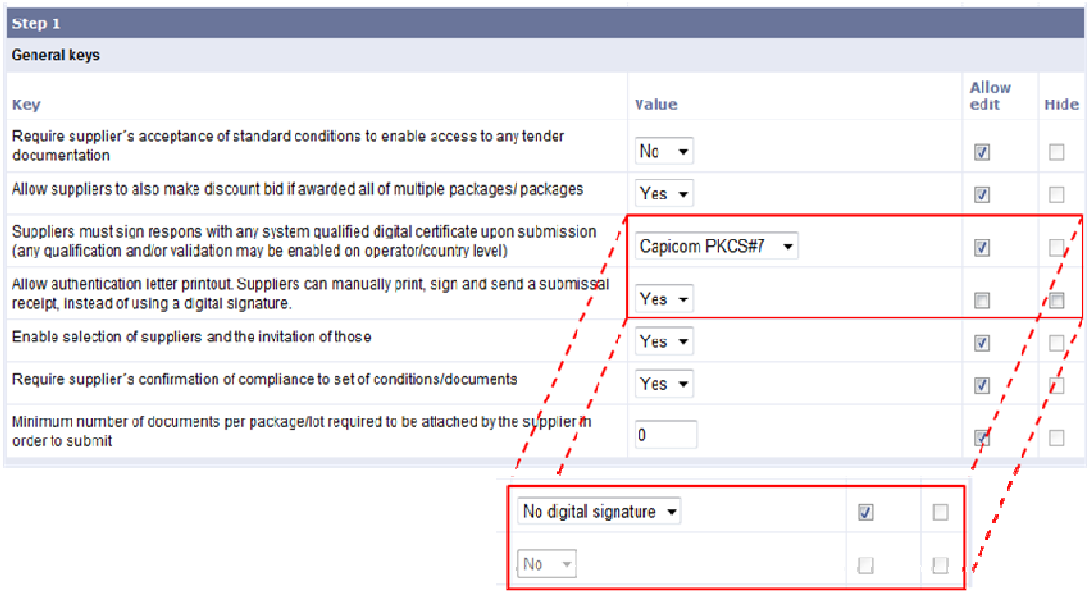
Certificate
There are two types of certificates you can upload to your user profile (i) Using when logging in and signing contracts (ii) used for encrypting and decrypting the tender box within an Tender.

i – The digital certificate to be used when logging in and signing contracts are uploaded from the page where you edit the main user information such as time zone and language.

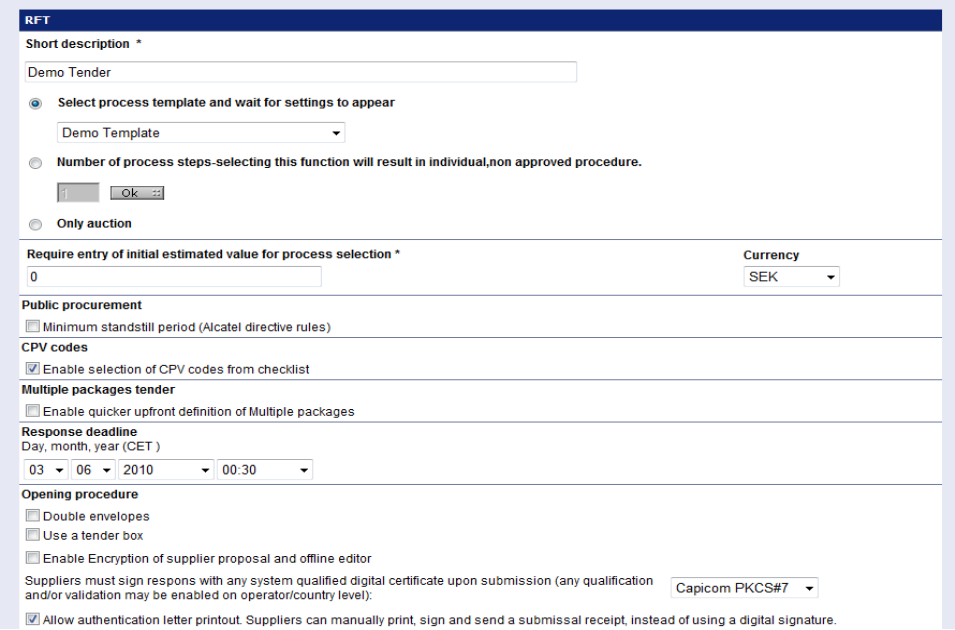
ii - Digital certificate within the main view are used when encrypting and sending envelopes as part of an Tender, when using the offline editor.

9.2 Digital signatures

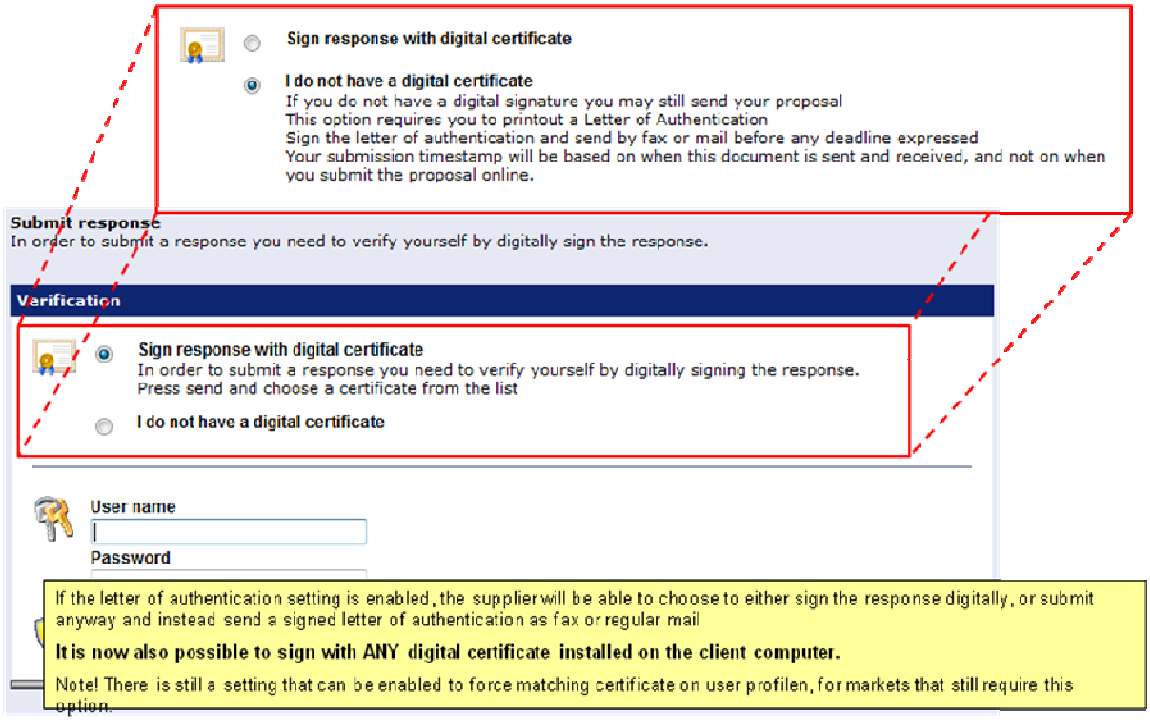
Within the system you can use and set different variations of certification to be used for digital signing. These can be set on country level and on organization level. Below you see that these settings appear and are possible to set (if you have the digital signature module) within the procedure template. The setting for allowing letter of authentication can also be set in the procedure template. If you have any of these you will automatically have the other setting.



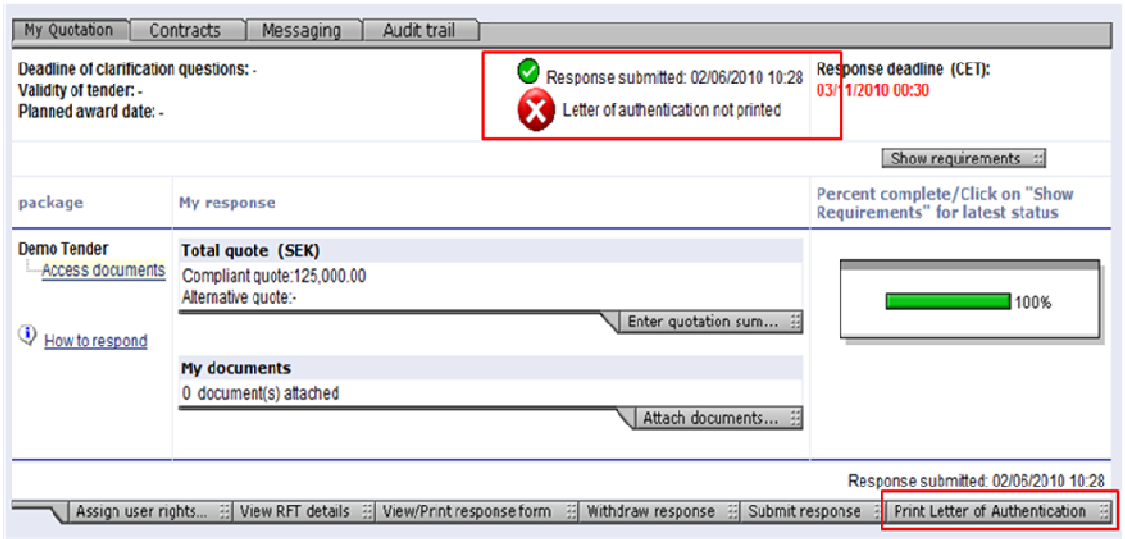
If the template are set up that this should be editable on each occasion you will as a normal user be able to decide for each tender if you wish to allow/force any of these functions. See bottom lines.

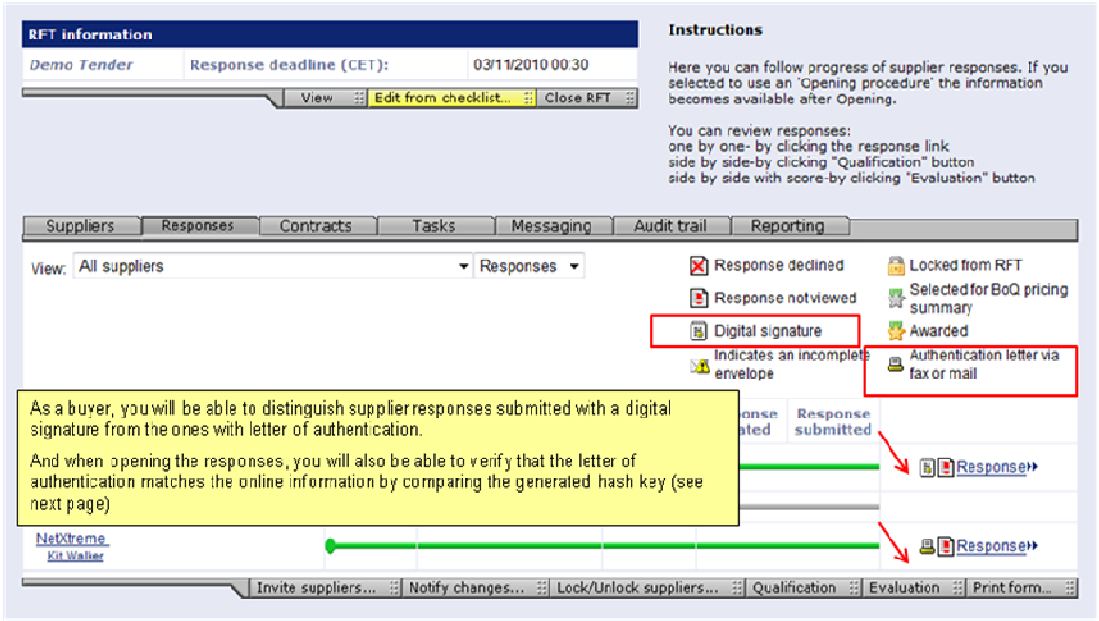


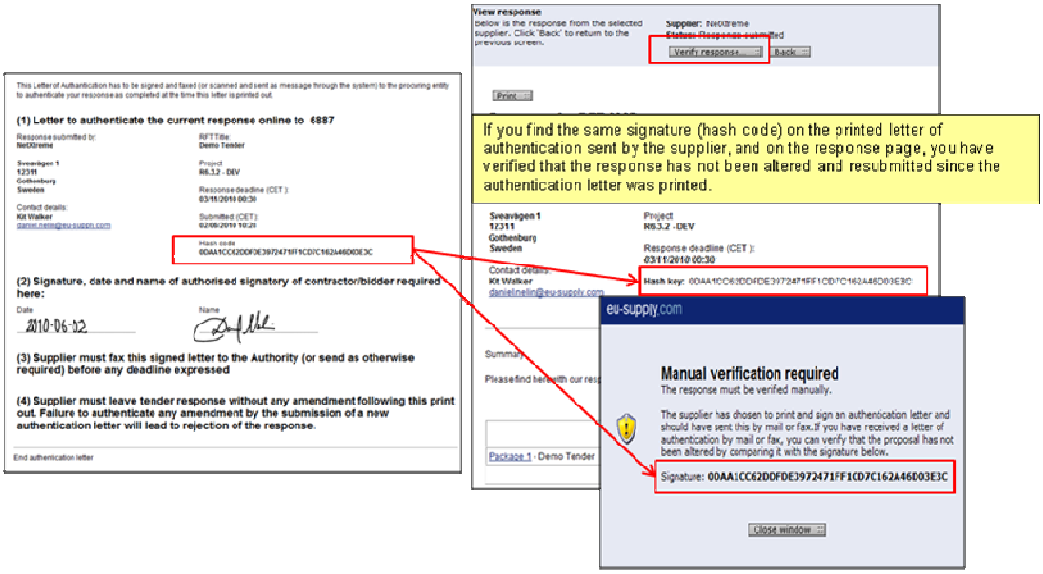
.



This is the supplier page where you can see that the supplier gets information and a button to print the authentication letter if you have chosen to let them respond this way.





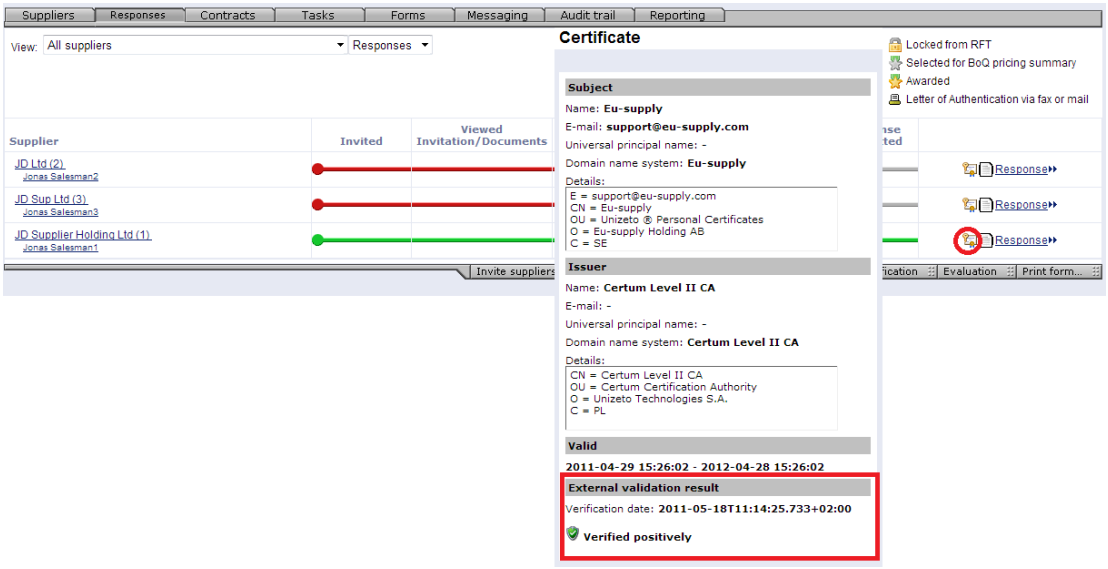


9.2.1 Verification of digital certificate against external validation service

It's now possible for buyers to validate the certificate used by suppliers when sending the proposal against an external validation service (Unizeto). Suppliers can also check any certificate before sending the proposal if the certificate is valid. On the supplier side there is also a link to view the certificate used for signing.

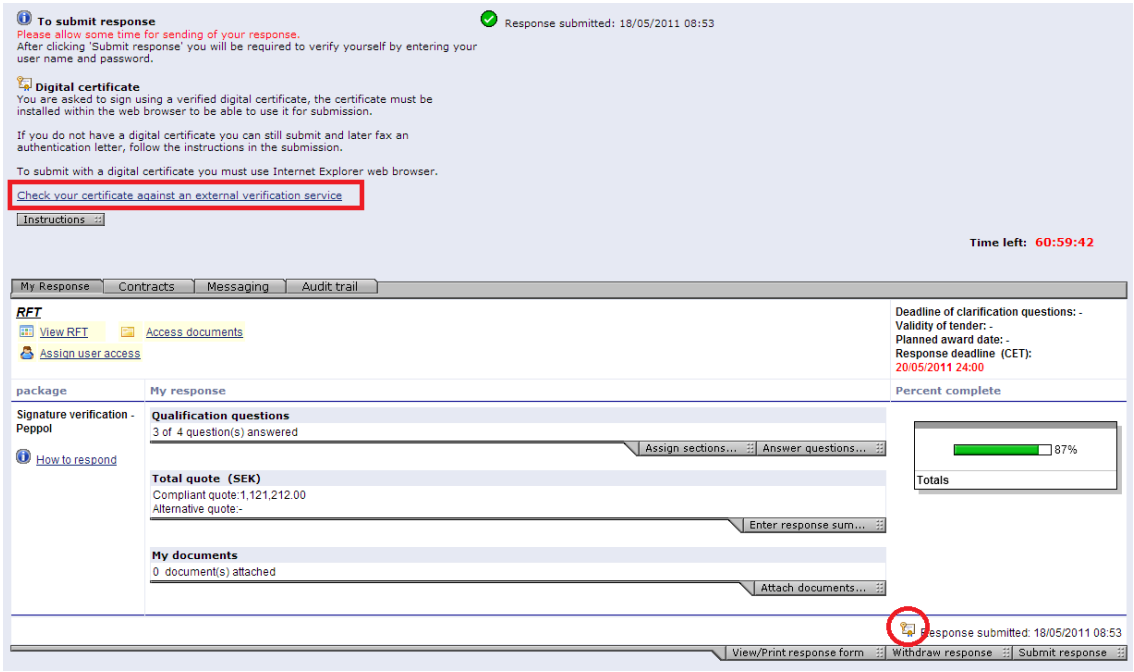
Buyer side:

Clicking on the digital signature icon will show the certificate used for signing and validation of the certificate will be done against an external validation service.



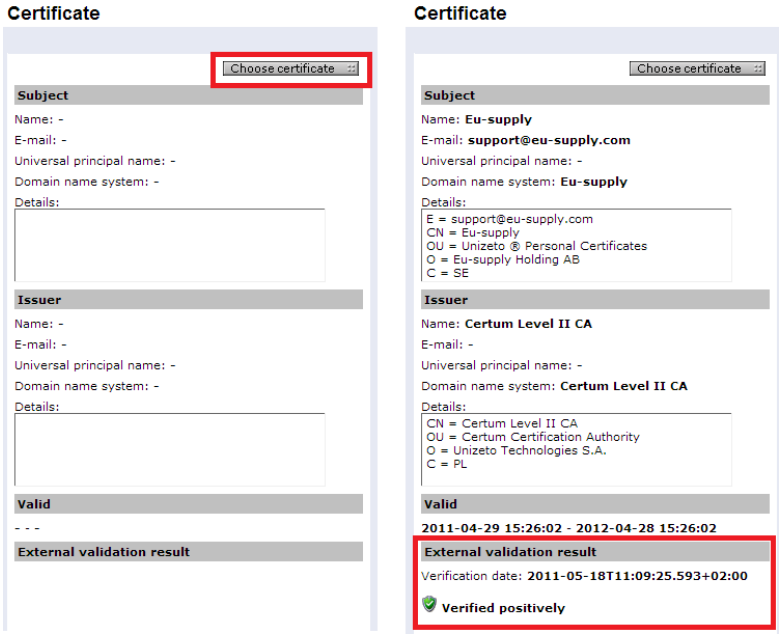
Supplier side:

Suppliers can test a certificate against an external validation service



Suppliers have the possibility to view the certificate used for signing.

Checking certificate against an external validation service



9.3 Approvals

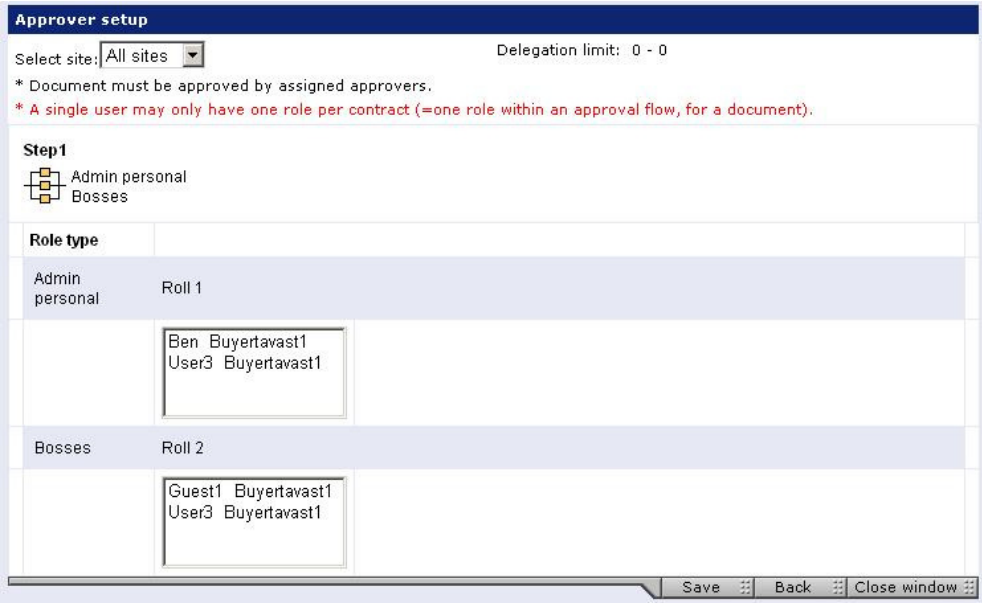
The system allows you to set up approval rules that require approval of certain documents at different stages throughout a transaction. The administrator manages the set-up of the approval relationships for your company (see the Administrator Guide).

9.3.1 Request an approval

To request approval:

1. When needed, request approval for a document.

2. The approval configuration window is displayed with the different alternative persons available.



3. Select the desired approvers and click [Save].

4. The request is created and sent to the selected approvers. It can be sent in parallel or sequential flow depending on the configuration made by the administrator.

5. To see the status of the approval, from home page My Approvals and the { Sent requests } tab

9.3.2 Respond to received approval request

A message is sent to you when someone has requested your approval. Your approvals are also accessible directly from the service menu on the main page.

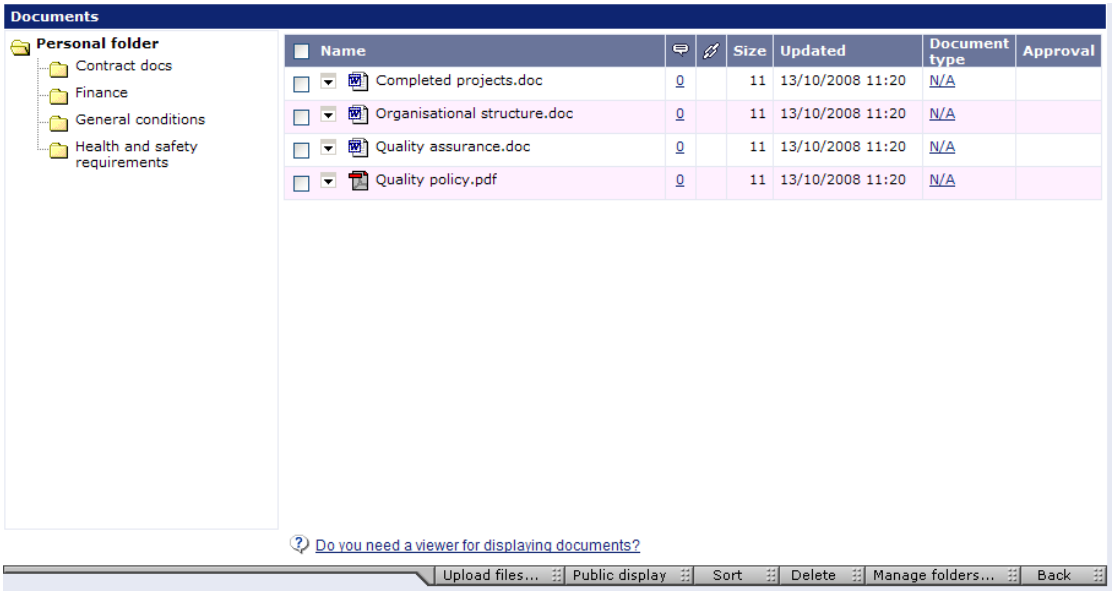
Click on My Approvals link from the home page to reach the outstanding approvals. A list is displayed and status can be set. To view the information to be approved or enter a comment, click on the related links.

When clicking the [Save] button the approvals are saved and a message is sent to the user that sent the Request for approval or to the next approver.

If a request is disapproved the user can send a new request later when the appropriate changes have been made.

9.4 Document folders

The Document folders enable storage of documents on the system for use in Tenders or quotations without having to upload the same document multiple times. Also distribution of new versions etc. becomes easier.



The following document folders are available:

- **Company document folder –** The place to store documents that are shared throughout the company and used in Tenders. Any user within your company can link or copy these documents to any Tender or contract. Only the company administrator can update documents within the company folder.

- **User document folder –** The place to store your personal documents. They are not available for any other users.

- **”Project” document folder –** The place to store documents related to a specific ”Project”. Any user having access rights to the ”Project” can download these files, any editor can change, delete or add documents to the ”Project” folder

When a Tender is created documents or folders can be “linked” from the folders to be included in the Tender. When a document or folder is linked any changes to the document/folder also are reflected in the Tenders that have included the document/folder.

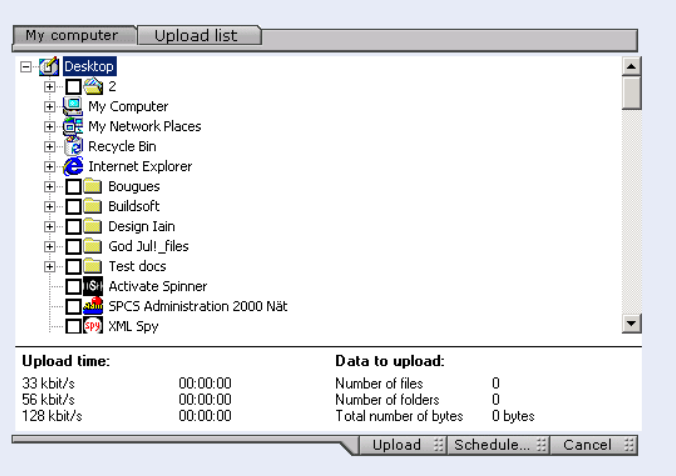
9.4.1 Upload documents from PC

Documents are uploaded using the upload facility. Documents can either be uploaded directly or scheduled to take place during off office hours if large amounts of data are about to be uploaded.

To upload documents from your PC:

1. From the home page, go to the archive/folder to upload documents to.

2. Click on the [Upload files…] button. This presents the Upload Manager where files and/or folders can be selected. If folders are selected the folder hierarchy can be uploaded as well. It is therefore recommended that you structure the documents in folders as desired on the PC prior to upload.

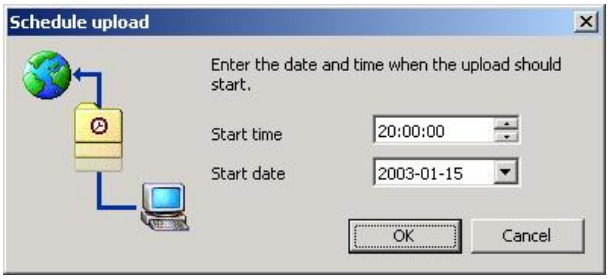


To schedule an upload of documents:

1. From the home page, go to the archive/folder to upload documents to.

2. Click on the [Upload files…] button. Select the files to upload.

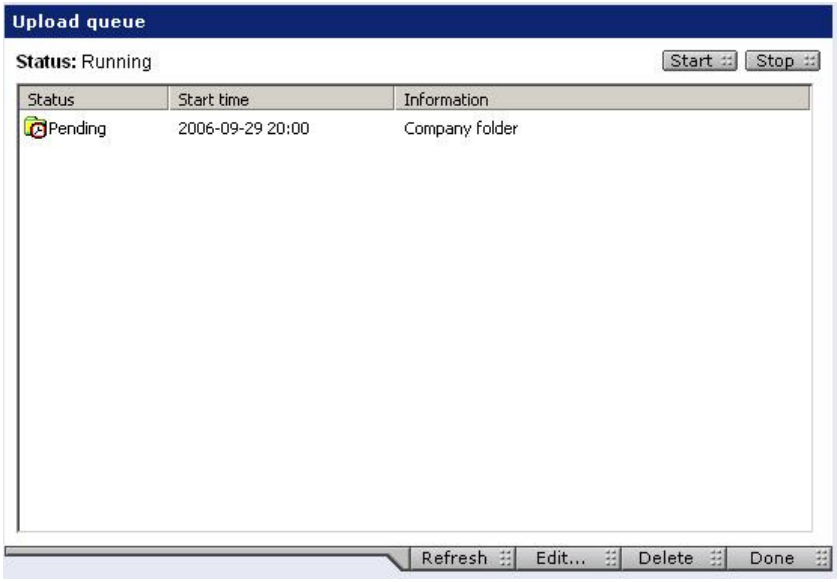
3. Click on the [Schedule] button. In a window you can set the time of the Upload. Your computer will then, if connected to the Internet, start the Upload at the desired time.



NOTE! The PC must be left on with an open internet connection for the schedule upload to be able to start.

If you want to cancel a scheduled upload or review status of them, click on the Scheduled Upload link on the main page. Or click the in the tray of your PC.

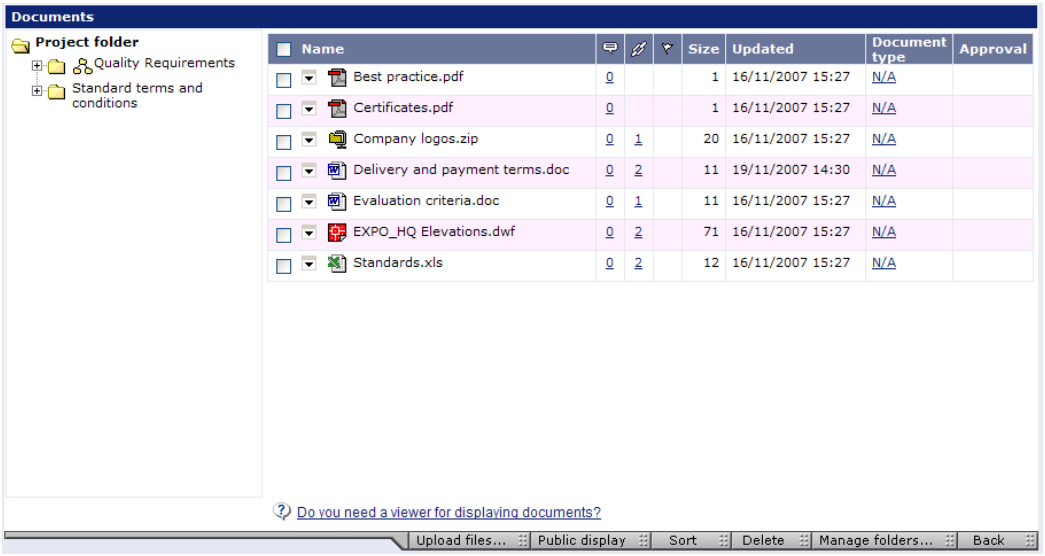
A window is displayed listing the jobs that have been scheduled and their status.



9.4.2 Version management

To upload a new version of a document:

1. Click on the arrow down in front of the document and select Edit….



2. The document details are displayed.

3. Click on the [Upload new version…] button to upload a new version of the document.

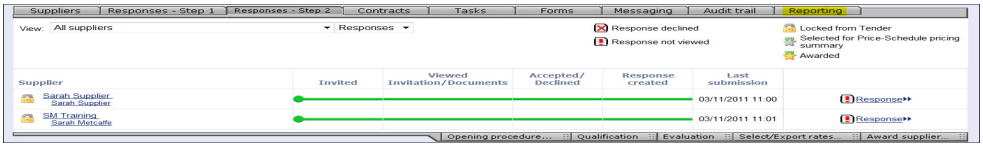
4. The action list for all Tenders including this document will now include an entry regarding the change of version.

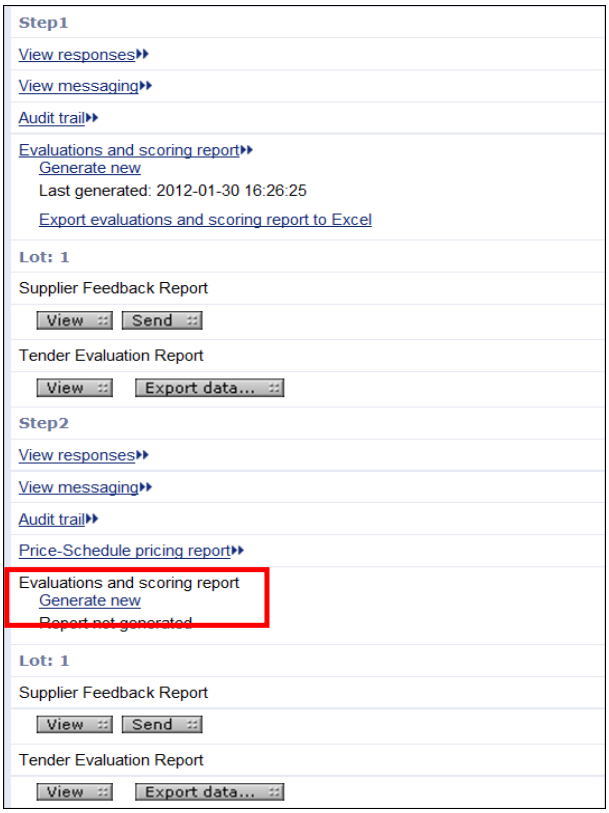
9.5 Reporting

The CTM application supports different types of reporting. If running the solution using own HW infrastructure there is the possibility to develop any own reports desired. If running hosted we can also provide reports meeting almost any needs.

The standard configuration includes a set of reports using XSL/XML or Excel. We are happy to tailor additional reports using this technology or integrate standard reporting tools on a need basis such as Crystal Reports or Business Objects.

You can also reach tender specifik reports from the Reporting tab within the tender





The most commonly used report is the evaluation report
Click on **Generate new** as highlighted above

Once it has generated click on refresh icon or F5 to refresh your page and show the excel version of it. The top version is in wordformat.

The example below shows the weights assigned to the questions and the scores assigned by the buyer.

				Weight (%		Sarah Sup			SM Trainir	
Weighted score for al				100		61.00			52.00	
[link3] 11126: ITT										
[lot] 1:										
	Technical									
		A1: Provic		20.00		please see	60		Please see	70
		A3: What i		20.00		24 hrs	80		48hrs	55
	Quality									
		B1: Do you								
			Yes			x			x	
			No							
	Innovatio									
		C1: How d		20.00		send then	0		vrhie re re	60
		C2: Do you		20.00			100			0
			Yes			x				
			No						x	
			N/A							
	Sustainab									
		D1: What i		20.00		hrei herhe	65		hrio op er	75
		Lot / Packa								
		Package a								

In addition to the Evaluation and scoring report you can generate a full Tender Evaluation report.

This will provide a summary, the weighted score per question for each supplier and any comments added by the buyer at time of scoring.

- Go to 'Tender Evaluation Report' – View or Export data

View mode:

Summary

Section	Weighting
Technical Capability	40
Quality	0
Innovation	40
Sustainability	20

Section: Technical Capability

Supplier	Weighting	Score	w Score
Sarah Supplier	40	140	28
SM Training	40	125	25

Section: Quality

Supplier	Weighting	Score	w Score
Sarah Supplier	0	0	0
SM Training	0	0	0

Section: Innovation

Supplier	Weighting	Score	w Score
Sarah Supplier	40	100	20
SM Training	40	60	12

Section: Sustainability

Supplier	Weighting	Score	w Score
Sarah Supplier	20	65	13
SM Training	20	75	15

Section: Technical Capability

Question	Weighting	Supplier	Answer	w Score	Comment
A1 - Provide a case study demonstrating your experience of supplying a large organisation within a tight timeframe.	20	Sarah Supplier	please see attached document	12	
A1 - Provide a case study demonstrating your experience of supplying a large organisation within a tight timeframe.	20	SM Training	Please see attached	14	Good range of experience
A3 - What is your turn around from receipt of order to delivery?	20	Sarah Supplier	24 hrs	16	Excellent
A3 - What is your turn around from receipt of order to delivery?	20	SM Training	48hrs	11	Disappointing

Section: Quality

Question	Weighting	Supplier	Answer	w Score	Comment

Section: Innovation

Question	Weighting	Supplier	Answer	w Score	Comment
C2 - Do you invest in R&D	20	Sarah Supplier	Yes	20	
C2 - Do you invest in R&D	20	SM Training	No	0	
C1 - How do you ensure your staff are kept up to date with latest developments?	20	Sarah Supplier	send them on a variety of courses. Invest 5% a year on staff training	0	Clearly demonstrates a formal commitment to professional development
C1 - How do you ensure your staff are kept up to date with latest developments?	20	SM Training	vrhie re re prh greiphgrepihgrepohg reiohgrpe eririufgg oeihgeo erpo p	12	

Export data mode:

Tender Evaluation Report

Tender Name	**Purchasing-Office Furniture**	
Tender No	**RFI / RFQ 11126**	
Work Lot	**1740**	

Summary	Weighting	Sarah Supplier			SM Training		
		Score	w Score	Comment	Score	w Score	Comment
Technical Capability	40.00%	140	28		125	25	Good range of experience
Quality	0.00%	0	0		0	0	
Innovation	40.00%	100	20		60	12	
Sustainability	20.00%	65	13		75	15	
Total Scores	**100.00%**	**305**	**61**		**260**	**52**	

Technical Capability	Weighting	Sarah Supplier			SM Training		
Question		Answer	w Score	Comment	Answer	w Score	Comment
Provide a case study demonstrating your experie	20.00%	d document	12		Please see attached	14	Good range of experience
What is your turn around from receipt of order to	20.00%	24 hrs	16	Excellent	48hrs	11	Disappointing
Total Scores	**40.00%**		**28**			**25**	

Quality	Weighting	Sarah Supplier			SM Training		
Question		Answer	w Score	Comment	Answer	w Score	Comment
Do you have a formal customer complaints proce	0.00%	Yes	0		Yes	0	
Total Scores	**0.00%**		**0**			**0**	

Innovation	Weighting	Sarah Supplier			SM Training		
Question		Answer	w Score	Comment	Answer	w Score	Comment
Do you invest in R&D	20.00%	Yes	20		No	0	
How do you ensure your staff are kept up to date	20.00%	staff training	0	Clearly demonstrates a formal commit	hgeo erpo p	12	
Total Scores	**40.00%**		**20**			**12**	

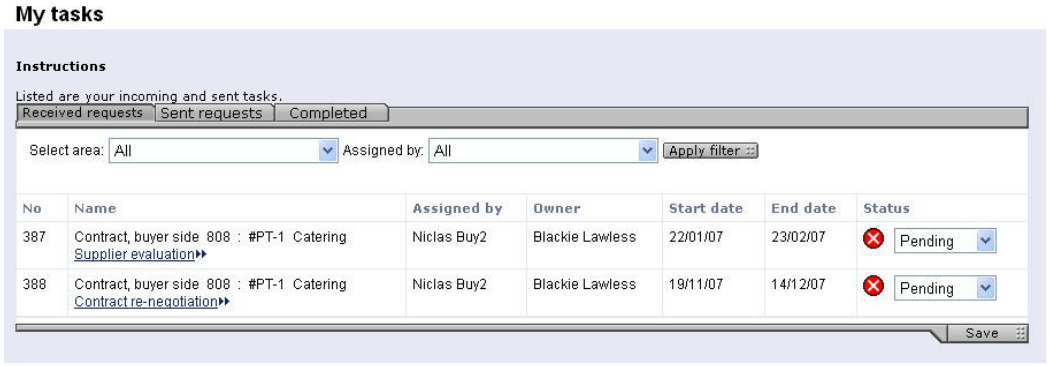
Sustainability	Weighting	Sarah Supplier			SM Training		
Question		Answer	w Score	Comment	Answer	w Score	Comment
What is your policy for minimising waste?	20.00%	o ropu rope	13	u h hfp irteuwqi foe ewow eoglfls epeo	phepof hepo	15	
Total Scores	**20.00%**		**13**			**15**	

9.6 My tasks

From the home page a link is available to “My tasks”. This shows an overview of the tasks that the logged in user is involved in.

The user that is the owner of the contract can assign tasks to different users and external persons. The tasks assigned to other users by the logged on user can be viewed on the tab { Sent requests }. There, the owner of the task is shown together with start and end dates. The external sent tasks appear at the senders list to set at ready (this due to fact that external person has no access to system thus the task could otherwise never be set as completed)

The user that has been assigned different tasks can review the list of tasks as well. On the tab { Received requests } are the tasks that can be assigned to this user by other contract owners.



When a task is set to complete by the assigned user, the task will be taken off the Requests tab. It can then be found on the { Completed } tab instead.

9.7 Other areas

This section describes the areas not covered in any section above

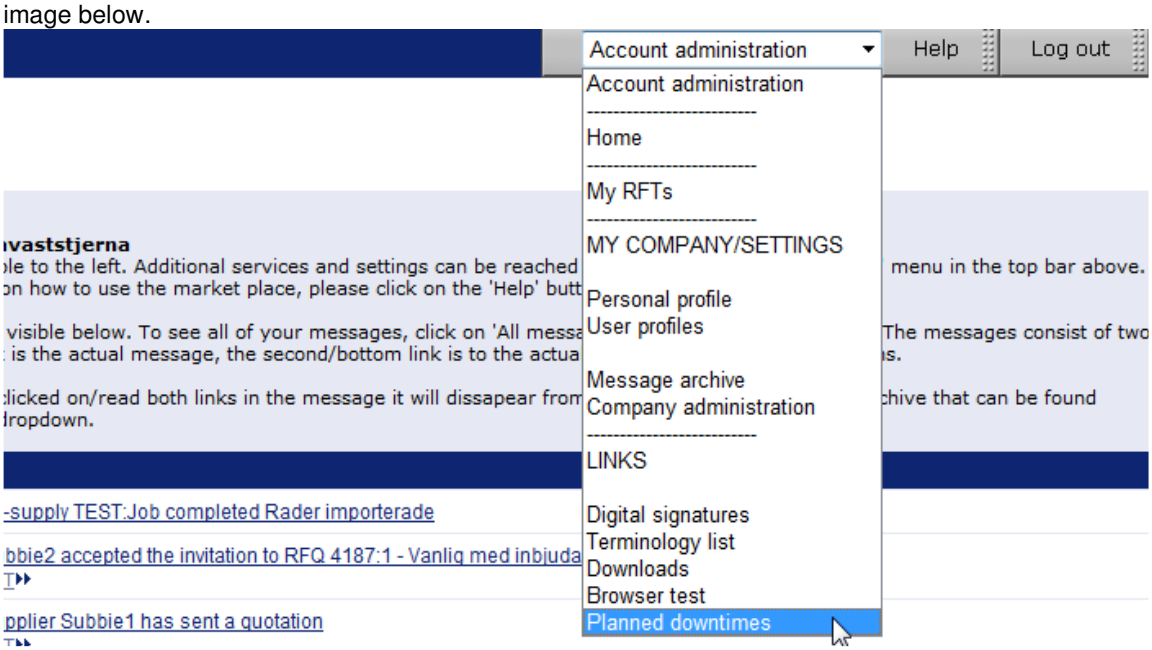
9.7.1 Simplified graphical user interface

Simplified graphical user interface is a setting that each user or company administrator can set on his user profile.

The simplified user interface is used for more “beginners” of the system and those users that only will be using basic functionality. Having the simplified graphical interface enabled will allow users to enter directly into the My Tenders list and when working with an Tender it will only show the check-list view with easy access to the different parts.

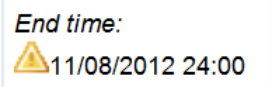
9.7.2 Planned System (CTM) down time

To give end users a notification of coming CTM down times, there is a page accessible from the main menu, which lists the planned CTM down times, see image below.



As an additional warning when the downtime is closing there will be a warning text displayed on the top of the most often accessed pages (see image below). The pages with the additional warning: Home, My Tenders and Tender checklist.

As a contracting authority, you will want to know if the end time you have set or are setting on your tender is conflicting with a planned downtime - for that purpose there is an additional warning in the MyTenders list next to the end time.



Warning in My Tenders list

Also, when setting the end times for your tenders you will be given a pop-up warning if the times conflict.

9.7.3 Check in / check out functionality

The check in / check out functionality is a way of locking items within the system for editing, for example when working with a qualification questionnaire a single question can be locked (checked out). Other users will see the lock and get warnings if they try to update the locked (checked out) question. Once the owner of a question is completed he unlocks (checks in) the questions. The locking is not explicit other users can still make changes.

Items within the supporting the check out / check in are:

Questions – Within Tender and templates

BoQ items – Within each Tender and within the ”Project”

Documents – Within any folder, ”Project”, Tender or company

NOTE, to have this functionality your company administrator have switch it on within the company profile.

9.7.4 Opening and Tender Protocol (separate module)

Opening protocol is available on each step within a tender and the tender protocol is available for the whole tender, regardless how many steps included.

The opening protocol has additional logo and address to the contracting authority. The logo and address is taken from the company profile.

The protocol will be available for editing after opening of tender box or opening of envelops and it will be lock for editing after you invite any supplier to the next step if you have a multi-step tender, otherwise it will be lock after you award a supplier.

OPENING PROTOCOL

COMPANY NAME

Address
12345 City
www.mysite.com

Case number: 2208
Description: PBI 2208 Test 2 Step 1
Process: LOU
Type of contract: Works Supplies Services
Owner: Renier B1 Perez

Specifications
Date of publish: 18/05/2011 00:00
Response deadline: 18/05/2011 00:30

Opening procedure
Opening date: 18/05/2011 15:16
Tender box opener: Renier B1 Perez, Renierb2 Perez

Invited suppliers

Date	Bidders (name)	Organisation no
18/05/2011 15:10	Renier S1	1234356
18/05/2011 15:10	Reniers2	24545621346456

Submitted quotes

Date	Bidders (name)	Organisation no
18/05/2011 15:12	Renier S1	1234356
18/05/2011 15:13	Reniers2	24545621346456

Notes

Here goes the notes for step 1

Opening protocol

Tender protocol is available for the whole tender. It has a new section of linked opening protocols. The protocol will be available for editing after the “intention of award supplier”.

TENDER PROTOCOL

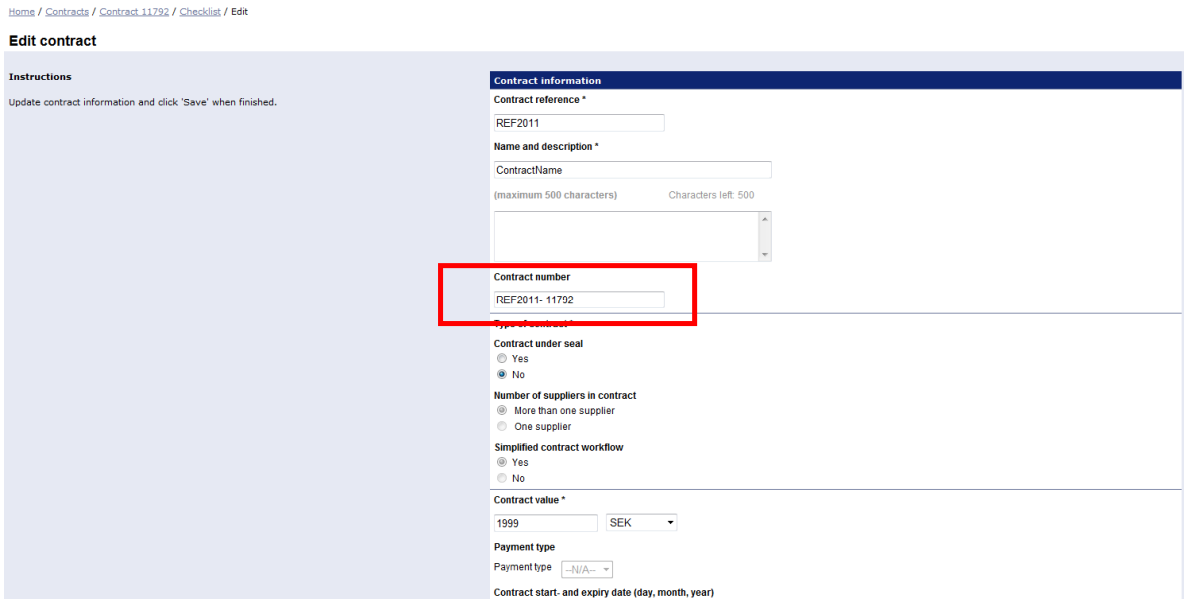
Linked opening protocols

PBI 2208 Test 2 Step 1
PBI 2208 Test 2 Step 2

Tender protocol

9.7.5 Contract number (separate module)

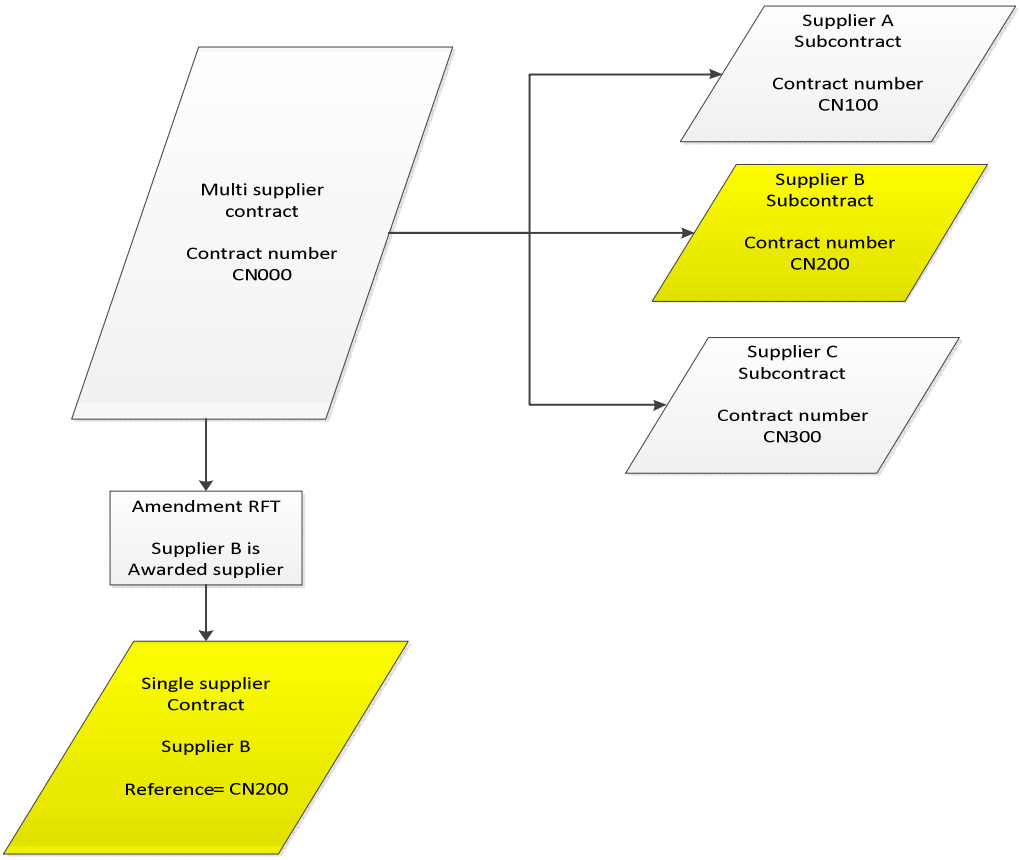
Contract number is a property on a contract, it is an editable field and is default set to <contract reference> - <ctm internal contract id>. The purpose of the field is for the contracting authority to have a field which can be used both as reference and unique id at the same time.



Reference is defaulted to contract number for Amendment RFT contracts – if you have the contract number functionality switched on.

When creating a contract for an Amendment RFT the **reference** field will be defaulted with the contract number from the awarded supplier's base contract (the contract the amendment RFT was created from).

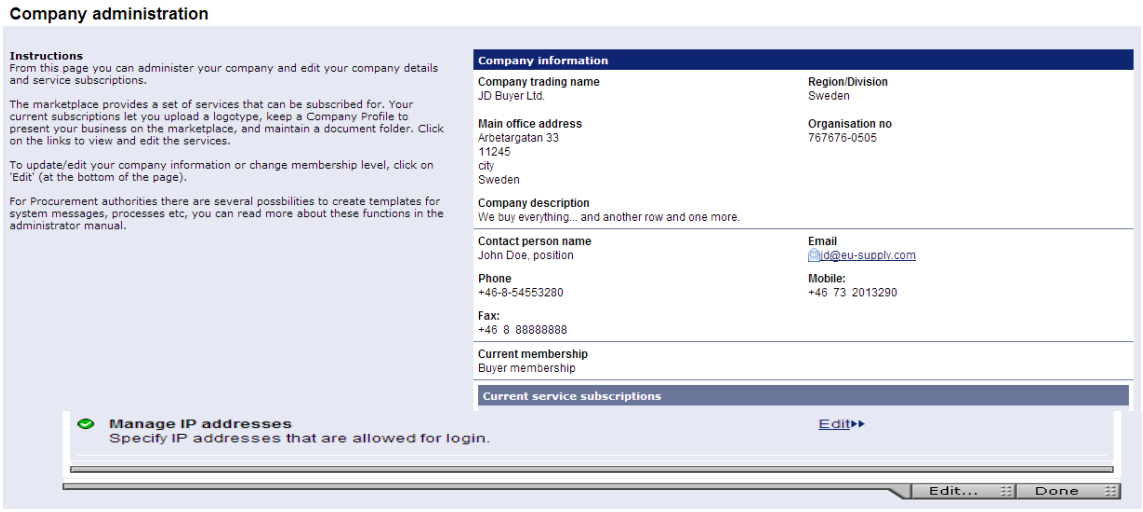
Below is a schematic image on how the contract numbers and references are pre-filled

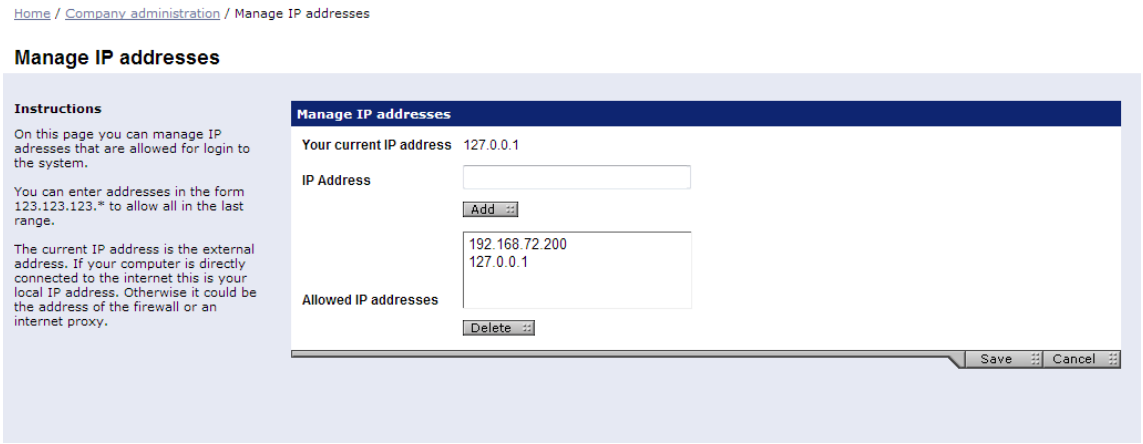


All related contracts (contracts that are created on the same base RFT, including amendment RFT contracts) are listed in the Main contract page for a supplier. Ensuring the supplier finding of any related contracts

9.7.6 IP check (separate module)

This exists if a company wants to limit the access to CTM to only be allowed from specific IP addresses.





9.7.7 Printshops

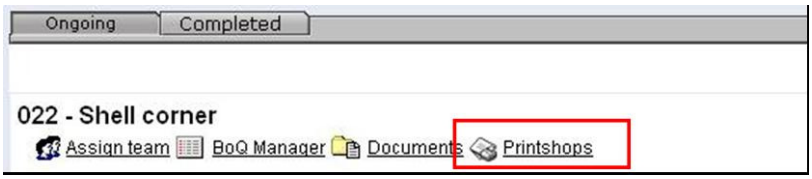
A print shop is a third-party business to where you can send documents for printing, for example large drawings. A print shop needs to have access to the system for you to be able to use it, and your company administrator must have set it up for usage within your company. If you are missing any print shop, contact your company administrator. Any documents you may send for printing to a print shop are to be charged to your company.

Setting up a print shop
When setting up a print shop to be used within a ”Project” or Tender, you allow suppliers invited to participate in the Tenders to print free of charge any documents you have assigned to the Tender. Any prints requested by the suppliers invited will be charged to your company.

To set up a print shop for use within a ”Project”:

1. From the home page, click on the My Request for Tenders link. The My Request for Tenders screen displays.

2. From the My Request for Tenders screen click the Print shops link. The list of available print shops within your company displays.



3. Select the print shops you want to set up for free printing for the suppliers, edit the tariff and service information if needed and click [Save].

4. The selected print shop(s) are now available to use free of charge by the suppliers to print any documents you may attach to the Tenders. All prints ordered within your company can be viewed from the Printshops link from the home page.